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ABSTRACT

The findings of a planning study of arts and cultural programing on commercial and public radio and television are summarized in this report. Focusing on the decision making process on arts and cultural subjects in the broadcast industry, the report presents information on the following topics: how the phrase "arts and cultural programing" is understood by key broadcast executives, the terminology used in the industry to describe significant arts and cultural programing, the kinds of programing designated by the industry as "arts and cultural," how the amount of money and broadcast time for arts and cultural programs compare with those provided for other types of programs, the method used in the industry to determine audiences for arts and cultural programing, the means of support for such programing, and the kinds of programs that would be used if they were available. (FL)

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Research Division Report #4

Arts and Cultural Programs on Radio and Television

National Endowment for the Arts

September 1977

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A Condensation of a Report Prepared by Research and Programming Services, February 1977

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PREFACE

Early in 1976, the Research Division of the National Endowment for the Arts requested competitive proposals for a planning study aimed at a national survey of arts and cultural programming on commercial and public radio and television. This project was requested by the Public Media Program. The proposal from Research and Programming Services was selected. This small media research consulting firm had been extensively involved in the analysis of program content and audience analysis for a number of organizations in the public broadcasting industry and had extensive knowledge of the various television audience measurement systems at the outset of the project.

Plans to follow up this planning study with a national survey have been dropped, partly because of major changes in personnel and program emphasis in the Public Media Program (now called Media Arts). The extensive material collected during this planning study, however, can be so helpful in understanding the decision-making processes on arts and cultural subjects in the media that this condensation of the final report has been prepared for general distribution.

This study presents information on the following questions:

How is the phrase "arts and cultural programming" understood by key executives?

What terminology is used to describe the broadcasting that includes significant programming about arts and cultural subjects?

What kinds of programs are designated by the broadcasting industry as arts and cultural?

How do the funds for arts and cultural programming compare with funds provided for other types of programming?

How many hours have been devoted to arts and cultural programming in the past calendar year in relation to total hours?

What is the method of determining audience for such programming?

What means of support are found for such programming?

What kinds of programs would be used if they were available?

Answers to these questions were developed by Research and Programming Services through unstructured interviews with key decision makers and through literature research.

This report summarizes the findings of most general interest. The complete report, which contains additional information as well as recommendations on survey alternatives, may be seen in the Library of the Arts Endowment or borrowed on an inter-library basis. To do so, contact Mrs. Chris Morrison, Librarian, National Endowment for the Arts, Washington, D.C. 20506; telephone: (202) 634-7640.

Research Division
National Endowment for the Arts
August 1977

INTRODUCTION

It was expected before the project began that all questions might not be answered, or answerable, in the final report. This has proven to be true. "Arts and cultural programming" proved to be a term that was neither frequently used nor easily defined. In general, people were able to grasp what we were talking about without being able to provide neat category labels. Different people may have had somewhat different concepts in mind, but discussions tended to include a considerable amount of common ground. Thus, it was possible to have detailed discussions about topics such as specials, certain types of programming, high quality material, and classical or jazz radio formats. The subjective element in identifying art, and the difficulties this imposes for content analysis research quickly became clear. Published data also provided some surprises. We were able to use published data to provide estimates of certain phenomena such as the amount of classical music and the amount of money spent on the production of original PTV hours distributed by PBS. The Television Information Office in New York provided us with lists of specials and access to lists of network programs. On the other hand, "arts and cultural" was not a category that had been used in the available data analyses for commercial television. A great deal of financial information and even some programming information is available about commercial television. However, the information has centered on news and public affairs material, UHF/VHF differences, and other issues not related to the arts.

There are places in this paper where the discussion reflects industry-wide consensus, or the subjective (but we hope, informed) conclusions of the authors. Naturally, there may be different conclusions reached by others. We have attempted to give a picture that is as accurate as possible within the limitations of the information gathered in our interviews, relevant published material, and our experience.

We would like to thank all of the people who generously gave us their time and thoughts during the interview phase of this project. We hope that we have accurately reflected what we were told. But a report of this sort must naturally filter information through the perspective of the authors. We have tried to avoid distortions, and we hope that the interviewees find their statements properly represented.

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SUMMARY AND CONCLUSIONS

The radio and television industries have basic structural differences. There are just under 1,000 television stations (700 commercial and 250 public) and over 8,000 radio stations in the United States. The television industry is dominated by the three commercial networks which account for most prime time programming on approximately 600 network affiliates. Radio programming is on a station-by-station basis, with station formats rather than programs.

Because television has fewer stations than radio and because of the powerful network influence in television, television programming puts a greater emphasis on profitability. The three commercial television networks, their local affiliates, and independent TV stations concentrate on returning profits by attracting large audiences to justify high advertising rates. In radio, the proliferation of stations and lower investments leave room for more individuality. It is still possible for a radio station owner to choose a format for a station even if it does not maximize profits.

Executives at or near the top of both radio and television organizations make decisions affecting the amount of arts and cultural programming. At television networks, the vice-presidents in charge of special projects make decisions about most arts and cultural programs (which tend to appear as specials). At radio stations, the local owner, general manager, and program manager combine to determine the outline and specifics of station formats. The presence of arts and cultural programming is more a station-to-station phenomenon in radio. Corporate sponsors and television also make decisions affecting the amount of arts and cultural material. Usually, division chiefs, department heads or boards of directors make the final decisions on the support of arts and cultural programming for radio and public television. A few companies also support commercial TV specials of cultural merit, but most TV sponsors tend to buy advertising time and not programs.

We found no universally acceptable definition of arts and cultural programming. At best, the concept seemed to be subsumed under three broad areas: 1) broadcast of a performance (such as a symphony or a play); 2) the broadcast itself as an artistic or cultural event (video art, teleplays); and, 3) broadcast reviews or commentary about arts and culture. All of these three areas, however, beg the question of what is "arts and cultural programming." It is much easier to define the term with examples. We found that while broadcasters hesitated to define "arts and cultural," they were able to say whether a certain program or type of material fell within their meaning for the term.

Corporate support for arts and cultural programming is generally subject to the same considerations as corporate support for other programming. Commercial TV programmers are hesitant to air programs which do not draw sufficiently large audiences because, even if such programs are sponsored, they will reduce audiences for other programs on the network or station. Sponsors who support arts and cultural material seek to create a favorable impression among the target group of viewers. Because arts and cultural programming is generally felt to appeal to audiences with desirable demographic characteristics (affluent, well-educated, white collar), the audience need not be as large as the audience for programs that appeal to less affluent groups. The creation of image in a target group is seen as possible via support of cultural programming. Such support is not a mass marketing tool. Even so, most corporate support comes from advertising budgets. Due to federal support, public television and radio are slightly less subject to these conditions. However, public stations broadcast material underwritten by corporate sources and use funds donated by viewers (the more viewers, the more donations) as a major source of operating revenue.

We estimated that network television spent $20 million to produce forty arts and cultural 90-minute programs, while public television spent approximately $25 million on such programs in fiscal 1976. The $25 million spent for PBS's cultural programming represented 43 percent of the total nation PTV production budget for the year. Of the money spent for cultural programming on public television, over 40 percent came from corporations, and 18 percent came from the local stations themselves. Government funds, especially through the Endowments for the Arts and Humanities, also provided considerable support for PTV cultural programs.

Using an operational definition of arts and cultural programming that coincided with published categorization schemes, we arrived at estimates of arts and cultural material broadcast over the course of a year. For the three commercial television networks, about one of every 57 prime time hours might be called arts or cultural. For public television, the estimate is one of every 2.6 prime time hours. Of course, these figures do not take into account the vast differences between the large number of people watching the commercial television networks and the much smaller number of people watching public television. We have divided radio into AM, FM, and public. Considering classical and jazz as the primary formats that can be classified as arts and cultural, we found that 2.2 percent of all AM stations, 5.8 percent of all FM stations, and

43 percent of all public stations carry some arts and cultural material. Together, these three types add up to 4.8 percent of all radio stations. Jazz and classical music account for about 3.7 percent of all radio air time, or one of every 27 broadcast hours.

The quantity of arts and cultural material available to the public can be estimated from information about television schedules from published network sources, CPB's survey of public stations, and TV Guide. Present sources, however, do not provide this information in reliable detail.

TELEVISION

KEY DECISION-MAKING POSITIONS

The structure of the television industry in the United States is not monolithic. Decisions about programming come from a number of different sources: the three commercial networks dominate; non-affiliated independent stations have an impact in major population centers; public television offers the bulk of arts and cultural material; sponsors and underwriters are important; and the role of producers who develop projects is important. Although a fully detailed description of the television industry is beyond the scope of this study, it is possible to present a brief sketch of the structure of the industry and the key decision-making positions that affect arts and cultural programming.

COMMERCIAL TELEVISION

The Networks. Six of every seven commercial television stations in this country are affiliated with one of the three major networks. Through its affiliates, each of the networks can reach almost the entire U.S. population with the programming it selects. In practice, almost all affiliated stations carry almost all of the programming of their networks; and network programming takes place during the hours in which the most people are watching television. Thus, with the exception of the "access" period -- the half-hour from 7:30 pm to 8:00 pm -- the most important decisions about the programming that will be seen by most viewers are made at the network level.

In theory, individual stations determine what they broadcast; in practice, they take what the networks offer. Network affiliation and networked programming are the most financially-rewarding for a local station. Network-affiliated television stations have been among the most profitable businesses in the country over the last two decades. The three networks develop, acquire, promote, and distribute a full schedule of expensive programs designed to attract the largest possible audiences. They sell national advertising time in and around these programs to national sponsors. A portion of the national revenue is distributed among local affiliates as compensation for the use of their time -- so affiliates are actually paid to carry network programming; and affiliates also have local "spots" in which they can sell time to advertisers. The system encourages network affiliates to carry network programming, and the affiliates rarely deviate from the network schedule. Rare cases of

non-carriage by affiliates -- usually over issues of content deemed inappropriate for family viewing or politically sensitive in a community -- make news in the industry. The networks do all they can to achieve full carriage because non-carriage lowers national audience levels, which affect revenue.

The three networks had combined revenues of nearly $1.7 billion ($1,673,800,000) in 1975. They are not small organi- organizations, and programming decisions are made by well-paid men and women at high levels of management. In arts and cultural programming, most network activity is of little relevance. The focus of network programming is the development and broadcast of mass appeal, prime-time comedies, action/adventure programs, and movies (most of which would not be considered part of an arts and cultural category). However, all three networks have a key person in charge of special programming -- the one-shot programs that may include high quality drama or other cultural offerings.

Three offices, all located in New York, are in charge of specials for the three networks. Bill Storke for NBC, Tony Converse for CBS, and Bob Shanks and Ed Vane for ABC, have primary responsibility for the development of specials. Their responsibility includes special programming of all types; and most of it (documentary specials, Charlie Brown holiday specials, variety specials with pop music stars, awards specials) is not in the realm of arts and cultural programming. On the other hand, the networks do present specials that fall in the arts and cultural area. It is the general responsibility of the vice-presidents for specials to develop such programs, which are broadcast in an attempt to attract a sufficiently large national audience.

The men who make the key network decisions regarding arts and cultural programming are generally well-educated, cultured people. However, they are also employees of giant corporations responsible to stockholders for profitable operations. One television executive who has been in the industry since the early fifties told us that there is less room for arts and cultural programming in a corporate organization. He believes that when the networks -- especially NBC and CBS -- were under more personal control, they were more likely to commission new operas and maintain their own symphony orchestras simply because the men who owned and ran the networks wanted such things. In the current corporate environment, such money-losing operations cannot be justified to impersonal stockholders. Thus, one vice-president told us that commercial television can indeed be a creative outlet for high quality talent; but he noted that the "selective arts," such as ballet and opera, are inappropriate for a full national network. When CBS presented the Bolshoi Ballet, it had Mary Tyler Moore in Moscow with them; and

Beverly Sills starred in a special, but paired with Carol Burnett. Several commercial television executives were grateful that public television presented artistic material that could not attract large enough audiences to justify a commercial network airing.

It takes roughly a year and a half to develop the typical special for commercial television. During the process, a number of key decisions are made by network programming departments. The most crucial of these is probably the decision to pursue a proposed project. Accepted ideas are expected to produce successful programs; and the criteria for success includes minimum audience levels. The general opinion seems to be that the networks will not develop nor broadcast programs which are unlikely to achieve acceptable audiences. Even if such programs are fully-sponsored (i.e., there will be a profit), they will not be used because of their negative impact on the rest of the schedule. This is also somewhat true of public affairs programming -- although network news departments have their own powers to demand air time. In the area of specials, there is a trade-off between news documentaries and arts and cultural programming. (The F.C.C. and groups challenging television programming make broadcasters go to great lengths to document their news and public affairs coverage. To our knowledge, there has been no organized demand for more cultural programming or for documentation of its quality.)

The people in charge of specials are, in some ways, the artistic consciences of the networks. One such person thinks that if a program is well done -- even if people watch it for other reasons, such as the star performers -- something positive has been accomplished. He feels there is a need to be "venturesome"; yet he also feels that there are enough "quality" things to draw upon which have mass appeal without being self-indulgent. The rewards of his job include "being able to look in the mirror when he shaves in the morning." He is proud of his responsibility for specials.

Out of the network system comes perhaps an average of one special per network per month of an arts and cultural nature. There is not likely to be a dramatic increase. The reason is simple: network programming exists to attract viewers and to be sold to sponsors; and, as one network programmer put it, "You can bring high taste viewers to low taste programs, but you can't do the reverse."

Another aspect of network programming falls in the arts and cultural area: reporting and reviewing the arts. This is a minimal part of network content; however, 60 MINUTES on CBS occasionally presents a news feature about the arts, and NBC's TODAY show features Gene Shalit's movie reviews (which may exist more for entertainment than for the informative content of the reviews), book reviews, and musical performances.

Local Commercial Television. A significant amount of air time -- if not viewer time -- is not network programming. Some morning hours between network morning shows and soap operas, some afternoon/evening time surrounding the network news, the "access" slot at 7:30 pm, the 11:00-11:30 pm slot, and weekend afternoons are all locally programmed by network affiliates. In addition, there are more than 80 independent (non-affiliated) stations which program entire schedules. The local stations all have several decision-makers in their programming departments. In the frequent case of group ownership -- several stations owned by a single company -- there is ususally a central director of programming for the station group. Details about local decision-makers are not very relevant to this study, however, since arts and cultural programming is virtually non-existant in local air time or on independent stations.

The morning local hours are usually filled with old movies or a local talk show. An occasional celebrity from the cultural world may be interviewed -- often someone who comes to town to promote a book. This is usually determined by the producer of the program. Late afternoon/early evening programming tends to be syndicated talk shows (Mike Douglas, Merv Griffin, Dinah Shore) where, again, there is the possibility of a guest from the world of the arts. The 7:30 pm "access" period is filled with game shows, wildlife shows, and light entertainment -- nothing much to do with the arts or culture. Eleven o'clock is another news slot for network affiliates. There are also weekend afternoons -- at least outside the football season. This period, once known as the "cultural ghetto" has become the public service ghetto. Community access, minority-group representations, religion, and programming "to meet community needs" have joined with the inevitable old movies and "Three Stooges" comedies to drive out the drama and concerts of the early years of television. Non-football weekend afternoons are the least valuable commercial periods because there are few viewers. Stations use them to respond to regulatory, political, and moral demands. It is the time for religious programs and "talking heads" about serious topics.

The independent stations are on their own in filling a great deal of air time. Yet, they broadcast almost nothing in the area of arts and culture, with the possible exception of syndicated talk shows. Independent stations produce almost nothing besides local news and sports coverage. Their schedules are composed of sports, movies, and syndicated programs -- mostly old series that were once on the networks. When network affiliates are doing local news, the independent stations get their largest audiences with early evening reruns of old comedy series like "Gilligan's Island" and

"Hogan's Heroes" to attract large audiences of children. This year, "Mary Hartman" has become a prime competitor -- scheduled in the 11:00-11:30 pm time slot against affiliate's news in several markets. The decisions made by programmers of independent stations reflect the basic fact of commercial television: audience size results in advertising income. And the best return of audience size for investment cost is found in the syndication market.

A recent innovation may eventually result in the entry of higher quality material into schedules of independent stations (and some network affiliates). It is the concept of the temporary fourth network. Under certain circumstances -- generally the cooperation of a producer and a national sponsor -- groups of stations can be brought together to carry a special or a series released on the same date and broadcast on the same day of the week. (The prime advantage of simultaneity is superior national promotion.) Mobil Oil Corporation created such a situation with "Ten Who Dared", the BBC series about explorers. It is not unlikely that dramas and other cultural offerings may be presented by similar temporary fourth networks in the near future. The decisions, however, will not rest primarily with independent station programmers, they will only decide if an offer is attractive enough. Rather, the national sponsors, syndicators, and promoters will put such deals together. In local television it is difficult to pinpoint decision-makers who affect arts and cultural programming because such programming is so rare. There are hundreds of program executives throughout the country; and the trade association (The National Association of Television Program Executives, NATPE) has become a major force in the industry. One suggestion given to us was that the National Endowment for the Arts might want to sponsor a session at the NATPE convention to discuss arts and cultural programming on television. Some good might be achieved by such a session, although it would be a minor activity in the midst of the real NATPE business. Some of the typical issues: "Should we buy the "Gong Show" or "Bobby Vinton"? "What's the best time slot for "Dinah"? "What do you think of that film package with five Elvis titles and all of those monster movies?" There are many decision-makers who influence local commercial programming; but almost none of them are currently concerned with arts and cultural programming of the type that might interest the Endowment.

PUBLIC TELEVISION

Since public television broadcasts most of the arts and cultural material, its decision-making process is of some interest for the purposes of this report. Public television is a complex system of stations and organizations; and one

of its few unchanging aspects has been its ever-changing structure of relationships. ("Public television is at the crossroads" is a statement one veteran recalls hearing regularly for two decades.) A simplified description of the system, its sources of programming, and its sources of funds may be helpful for the understanding of arts and cultural programming on public television.

There are more than 150 organizations that hold licenses to broadcast television on non-commercial channels. (There are over 250 stations. Some licensees operate several stations.) Although great differences exist between these organizations, it is possible to group most of them into five broad categories:

1. Large member-supported stations. Eight stations in the largest metropolitan areas in the country are run by non-profit community corporations. These stations (WGBH in Boston, KQED in San Francisco, WETA in Washington, WNET in New York, KCET in Los Angeles, WTTW in Chicago, WHYY in Philadelphia, and WQED in Pittsburgh) derive a great deal of income from membership subscriptions sent in by viewers. These stations contribute the bulk of the U.S. production for national public television distribution.

2. Smaller member-supported stations. Between 45 and 50 stations are in relatively large metropolitan areas and rely on membership income for support. Most are run by non-profit corporations; a few are licensed to universities or school boards.

3. College and University stations in smaller communities. Approximately 40 stations are licensed to institutions of higher education and serve single, relatively small metropolitan areas. These stations tend to be supported as line items in the budgets of their parent institutions. Their mandates can include educational television services at the college level and/or the training of students in the use of television.

4. State networks. State agencies or authorities hold public television licenses in 24 states, Puerto Rico, the Virgin Islands, Guam, and American Samoa. Roughly 18 of these are centralized state networks that operate more than one station from a main central facility. The key source of financial support for these state networks is the state legislature -- either directly or via the state board of education. Most state networks are heavily committed to "service" programming and daytime classroom instructional programs. They do have an interest in the arts and the cultural life within their states.

5. School board stations. This is a diverse group of stations. Of approximately 20 such licensees, eight are in large metropolitan areas where there is another, larger PTV station. Four operate as though they were mid-sized member-supported stations. Seven are relatively small, low-budget stations, operating with school funds for the primary purpose of providing in-school television.

In addition to the stations, there are two major organizations in Washington which dominate the public television scene. One is the Corporation for Public Broadcasting (CPB), which receives a direct appropriation from the federal government. The other is the Public Broadcasting Service (PBS), which operates the "network" of interconnected program distribution. CPB distributes the bulk of its appropriation directly to the local stations in the form of "Community Service Grants" based on a formula reflecting station size. Some of the federal appropriation is used to support production of programs for public television -- either production by PTV stations or (recently) production by independent companies. CPB funding for arts and cultural meterial has tended to be part of a co-funding arrangement with other underwriters. PBS is supported by the dues paid by PTV stations. It maintains and operates the technical system which distributes national programs to the local stations, and it is closely involved with programming decisions at the national level -- encouraging and discouraging particular projects, and attempting to get stations together with potential sources of financial support.

Where do the programs come from? There are several sources that are quite unlike the sources of programming for the commercial networks (which get most material other than news and sports from independent production companies). Some PTV programs are made by local stations for national distribution; some are acquired after they have been produced by foreign television organizations -- mostly British; some are reruns of material that was originally produced for commercial U.S. television. CPB has begun to hire commercial TV producers to develop programs for national use.

Major producing stations KCET "Hollywood TV Theater", WGBH "Evening at Symphony", and WNET "Dance in America" are responsible for most of the regularly scheduled arts performance series produced especially for U.S. public television. As such, their production departments, program development staffs, and fund-raising abilities play an important role in the creation of arts and cultural television in this country. Other PTV stations, for example WTTW "Book Beat" and the Nebraska state network "Anyone for Tennyson", have also

produced cultural material for the national system. In addition, a great deal of material is purchased from foreign television sources. Series such as "Classic Theater" (funded through WGBH) and "The Pallisers" (funded through WNET) have been produced abroad, as have numerous individual concerts, plays, ballets, and operas which have been acquired for public television. To date, most foreign acquisitions used nationally (i.e., distributed by PBS) have been purchased through a PTV station which conducts negotiations, produces filler material, and collects overhead revenues. This means that the major source of program development in recent years has been the major stations.

The future, however, may hold significant changes; and there are already other sources of programming for public television. One such source is found in the combination of regional networks -- organizations that make group buys on behalf of member PTV stations in a particular part of the country -- and direct sales by program syndicators. At least three of the regional networks -- the Eastern Educational Network, the Central Educational Network, and the Southern Educational Communications Association -- purchase foreign material that is not distributed by PBS. Syndicators, notably Time/Life, have been selling programs both to the regional networks and to individual stations. Among the series acquired for local use by way of regional networks of syndication have been "The Rivals of Sherlock Holmes" and "Monty Pyghon's Flying Circus". In addition to foreign materials, the regional networks and the syndicators also offer local stations the broadcast rights to old commercial programs. Thus, "Victory at Sea" has been on several public stations. This year PBS will also be distributing reruns of old "Hallmark Hall of Fame" dramas.

Independent production companies are a new source of material. CPB has explored projects from Norman Lear (producer of "Mary Hartman", "All in the Family", etc., for commercial TV), David Dortort (producer of "Gunsmoke") and others. The National Endowment for the Humanities is funding projects from independent production companies. Federal funds for children's programming are going to non-station producers. The Children's Television Workshop (CTW), creator of "Sesame Street" and "The Electric Company", is involved in a major PTV drama/history project (pilot title: "Best of Families"). When PTV stations are not directly producing or acquiring a program, programming decisions are in the combined hands of the producing organization and the source of financing. The situation can range from a request for proposals from a federal agency, which is open to any producer, to CTW's heavy investment in developing a project for which it hopes to find financing.

Financial arrangements in public television are unlike those in commercial television. The networks pay for the development of programs and then buy them from producers. They recoup their investment (plus profits) through the sale of time for advertising. Public television either spends its own money for production or it obtains underwriting in advance from the government, foundations, or corporate sources. Commercial television series are generally open-ended. They remain on the air as long as they draw large audiences, and they are cancelled as soon as their audiences are too small. Public television series are almost always fixed in advance (so many new "Evening at Symphony" episodes, so many "Dance in America" episodes, etc.). If they are successful, they may or may not reappear in later years. If they are unsuccessful, they also may or may not reappear, and they almost never will be cancelled before the last episode has been aired. This is the result of a system in which financial commitments are made in advance, and programming success is unrelated to after-the-fact revenue or profit. Success in public television is not always defined in terms of audience size, although the relationship between large audiences, membership contributions, and corporate underwriting is usually acknowledged. Other measures of PTV "success" are related to the ways programs fulfill goals such as meeting the need for certain content or serving an intended target group.

In many ways, a description of public television programming requires a description of the sources of funds for the production and acquisition of PTV programs. There are a number of sources of funds, and each has its own reason for supporting PTV production. One product of such a system is that available programming is determined by the interests and attitudes of funders, rather than through a system dominated by audience size.

The stations themselves fund some public television programs. Through a computerized voting mechanism called the Station Program Cooperative (SPC) and the Station Acquisition Market (SAM), stations vote to support particular programs. In the SPC, stations use a computerized system to select from among proposals submitted by producing stations. All stations that select a program then share in its production costs in proportion to their size. Some proposals are partially underwritten, either by the producer or by an outside source of funding. The SPC works in a way that tends to support known programs and reject ambitious new proposals. After stations have purchased "Sesame Street", "Washington Week in Review", "Nova", and "Great Performances", little money is left for unknown projects. The SAM has been created to facilitate the purchase of material produced outside the PTV system. Its major use to date has been the purchase of a large movie package from Janus Films.

The Corporation for Public Broadcasting committed $13.32 million of its $103 million fiscal 1977 budget for production of PTV programs. ($51.5 million goes directly to local stations as unrestricted community service grants.) In the past, CPB financing has tended to provide partial support for arts and cultural projects with other support from corporate sources. CPB funded minority and target group projects and provided, along with the Ford Foundation, matching grants for the SPC. During and after the course of our inquiries for this planning study, CPB has somewhat reorganized its TV Activities Office and has begun to fund projects that are unlike some of its earlier ventures. Over a million dollars has been committed to participation in a BBC project to produce 36 Shakespeare plays. Agreements have been reached with commercial producers to develop programs for public television. The thrust of CPB policy seems to have moved toward a more audience-oriented approach.

Various major corporations -- notably some of the oil companies: Mobil, Exxon, Arco, and Gulf -- have contributed significant amounts of money for the production, acquisition, and promotion of programs for public television. Between fiscal 1973 and fiscal 1976, the corporate total climbed from $3.3 million to $13.9 million, of which $10.6 million came from oil companies. Much of the money from these corporate underwriters has gone for programs that might fall in an "arts and cultural" category. In return for paying for material on public television, corporate underwriters are given a simple credit at the start and close of each program. They also are able to use the fact that they support PTV as part of a corporate image campaign.

Federal funds have been used to support public television programs in a number of ways. The National Endowment for the Humanities has a large budget for television projects which it can partially or fully underwrite. The National Endowment for the Arts tends to give matching grants to support the production of programs and series. The National Science Foundation provides support for relevant PTV projects. The Department of Health, Education and Welfare also provides production funds from a variety of agencies and through the provisions of the Emergency School Aid Act (ESAA). Funds from federal agencies are limited to projects which fall within their scope of activity.

One other area of funding for public television programs relates to the strictly local acquisition and production of programs that are not distributed nationally by the PBS service. Local stations spend their own funds on the production of programs for their own communities. Typically,

such programs are concerned with news and public affairs; but an occasional special program is related to arts and culture, and sometimes there is a cultural component to the news/public affairs material. Acquisitions by local stations are more likely to be within a cultural category. These can be series or specials made available through regional networks, or they can be purchased directly from syndicators. The local money to pay for production and acquisitions comes from a variety of sources. All stations have discretionary funds from the CPB community service grants. Member-supported stations depend on income from subscribers, state networks use legislative appropriations, and college and school board stations use funds available from the institutions which run them.

The system described above obviously contains a large number of different decision-makers at different levels in different organizations. At the national level, there are the people who work in key positions for CPB and PBS. At the Corporation for Public Broadcasting, there are Donald Quayle, Senior Vice President, Broadcasting; Calvin Watson, Director of Television Activities; Peter Levathes, Director of Program Development; David Stewart, Director of Special Projects; and the program officers of the TV Activities Department. At the Public Broadcasting Service, a number of people are in a position to aid the development of projects. Lawrence Grossman, President; Chloe Aaron, Senior Vice President, Programming; Fred Cohen, Director of Arts and Humanities Programming; Dick Ellison, Director of Current Affairs Programming and several other members of the PBS staff are involved in the process of obtaining programming to be distributed for the national system. Major producing stations have a variety of people involved in the process of developing programs; the list is long and includes several individuals at each of the stations in Boston, New York, Washington, Pittsburgh, Chicago, San Francisco, Los Angeles, and elsewhere. In addition, people working for the funding organizations make crucial decisions in the course of program development. The media programs of the two national endowments are deeply involved in the selection of proposals for funding. Since all proposals which have reached production have been distributed nationally, the funding decision is a programming decision. For the same reason, the people who decide which programs will be underwritten by national corporations are in a critical position. Several of these corporations -- IBM, Exxon, Mobil, Xerox, and others -- employ media consultants or consulting firms to help them select and develop programs for broadcast on public television (and also commercial television). One consulting firm, Visualscope in New York City, has both Xerox and Mobil as clients. Individual consultants include a former critic and a former network programming executive.

Arts and cultural programming is far more frequent on public television than on commercial television. Non-commercial television includes multiple decision-making systems that can lead to programs which are broadcast by the local stations.

Each system is part of the larger process which leads to programs finally being broadcast over public television stations. National policies, local policies and the money available for certain types of programming combine to create the programming mix on public television. In contrast to commercial television, the public television decision-making process often produces national programming that can be called "arts and cultural" material.

SPONSORS AND UNDERWRITERS

The commercial television system includes little direct sponsorship of individual programs by a single sponsor. However, the exceptions are important for a discussion of arts and cultural television. Many of the commercial network specials, such as the "Hallmark Hall of Fame", were presented by a single sponsor. Recent trends include the Mobil Oil sponsorship of "Ten Who Dared" on a temporary network of selected stations and an IBM project for national distribution of high-quality movies (including "A Man for All Seasons") for use by independent stations in major markets. Arts and cultural programs in non-commercial television reflect a more important contribution on the part of "underwriters" who pay for the development and production, or support the purchase from abroad, of such programs. In fiscal 1976, for example, 74 percent of the corporate underwriting of PTV programming was in the category "cultural," and this represented 41 percent of all funds spent on new "cultural" programs in fiscal year 1976. Representatives of two important corporations that support arts of cultural programming were interviewed for this report.

The IBM Corporation and the Hallmark Card Company present a number of interesting similarities and contrasts in their approach to the support of high-quality television projects. In many respects, the differences in management between an enormous corporation and a large privately-owned company are apparent in the process by which decisions affecting arts and cultural programming are made. In both companies, the first and most important decision affecting arts and cultural programming is the development of a budget. Both companies draw money from their advertising budgets for the support of the arts and cultural programming, whether on commercial or public television.

At IBM, decisions concerning arts and cultural programming are made in the communications department, which includes advertising, public relations, exhibitions, and public affairs. The basic criterion for selection of material to be broadcast is that of the audience. IBM has a target audience for its projects. It wishes to reach key decision-makers in business firms. The object is to create a favorable impression of the corporate image of IBM with those who might be in a position to influence the purchase or lease of IBM products. Once the decision about the nature of the target audience is made, the management of the communications department looks for vehicles to reach this audience. Sponsorship of exhibitions, performances, exhibition centers, collections of art or films, and television are among the vehicles considered. In the case of television material, top management of the communications department (specifically advertising and public relations) seeks out "high quality" material and alerts sources that might come in contact with such material. When a program or proposal is found that the management of the communications department deems suitable for reaching the target group, the management makes a recommendation that it be developed (or rights purchased for broadcast), and seeks to determine if a favorable spot for it can be found on either commercial or public television. Once it is determined that a program is suitable, available, and can be placed favorably, the management of the communications department takes it to the top management of the corporation for screening and final approval.

The Hallmark Company, which is privately owned and smaller than IBM (though not small in an absolute sense) abbreviates the decision-making process. At Hallmark, it is only the top level of management that decides on the material that becomes the "Hallmark Hall of Fame." The properties that they sponsor come to Hallmark through either their advertising agency (Foote, Cone & Belding) or from NBC, the network that broadcast the "Hallmark Hall of Fame" for 25 years. When the agency or network brings a property to Hallmark's attention, a group of about six of the highest executives (Don Hall, President, and several division directors) individually review the property and form opinions of it. The individuals who do the reviewing are the people who have been at Hallmark long enough to understand the standards and style that has characterized Hallmark's relationship to drama in the "Hall of Fame." The votes of the reviewers come back to the advertising department where they are reviewed with Mr. Hall. On the basis of the review, the advertising agency is called and given the decision on producing or acquiring rights to the property.

Frequently, the occasion arises where the ad agency learns that a property can be had on short notice (e.g., Paul Gallico's "The Snow Goose"). In such a case, a quick conference is called between Mr. Hall and the head of advertising, Bill Johnson, and they give an answer to the agency the same day, if need be. It was through a very rapid process such as this that Hallmark acquired "Beauty and the Beast" at a substantial (six figures) savings.

From the time Hallmark gives the ad agency the go-ahead for a property to the time it is aired, Hallmark exerts no influence on the production. The ad agency hires the entire production crew and talent and oversees all production. The first time the Hallmark people see the finished product is when it is aired for the public on national television. The rationale of the Hallmark management is that they would never let a television producer tell them how to make greeting cards, so the Hallmark people will not interfere with the production of the television show. However, it should be noted that Hallmark selects non-controversial properties and the ad agency is familiar with Hallmark style and standards.

PRODUCERS

There are two basic types of producers: those who have an idea for a television show and try to sell it to television, and those who work for a television network and have to come up with material for a show on a regular basis. One of each of these types of producers was interviewed for this study.

As producer of the "Saturday Night" show for NBC, Lorne Michaels is the sole person responsible for decisions affecting the show's content. Ideas for pieces on the show are brought to him by writers and others as well as sought out by him. He decided to present minimalist art in the form of paintings and segments on experimental film. As the producer of the show, it is his judgment and decisions which determine the material that appears on the show. Above him is only the network censor, who follows established standards about what is allowable on television.

Mr. Michaels is a salaried network employee and does not own any part of the program. His job entails creating and sustaining a successful show. What makes the show a success for the network (and hence for Michaels) is the money it makes. The money it makes is determined by ratings: the more people that watch, the more money that can be charged for commercial time. In addition to the sheer number of

people viewing, the demographics (specifically age) of the viewers is also important. Young viewers (in their twenties and thirties) are the most likely to buy new products, so they are the most desirable viewers from an advertiser's perspective. Since they are more valuable for the advertisers, more money is spent for commercial time during programs that attract them. Thus, Michaels tries to present a variety of different features on his program that will be popular with young adults.

While it is the producer of the show who determines the content of each individual program, it is the network management that determines whether the show continues from season to season.

In the case of an outside production company, like Tandem Productions, the output of the company tends to be more varied: many shows (and shows of different types) instead of one. At Tandem Productions, Al Burton, Director of Development, explained the decision-making process as one taking place in a small committee. It is Norman Lear who comes up with most of the ideas for new programs. He brings a new idea to the small committee (consisting of Burton and Virginia Carter) where it is discussed and modified. After the idea is developed to a point where this committee is satisfied with it, the idea is presented to a commercial TV network, which then decides whether to commission a pilot. In the case of a program not meant for network distribution or rejected by a network, Tandem Productions may invest its own money in a pilot for use in selling the program to individual stations in a syndication procedure.

When presentation of a program is made to the buyer, suggestions for change are inevitable. These changes may or may not be carried out; the decision rests with Tandem Productions. If changes specified by the network are not made, however, the program may not be purchased (as happened with "Mary Hartman, Mary Hartman").

After a program is in production on a regular basis, more of the content decisions are taken over by the individual producer assigned to the program by Tandem, while Lear (and Burton and Carter) act as executive producers, consulting primarily on long-range planning and major decisions.

Since Tandem Productions is in business to make money, financial considerations are very important. Tandem owns the programs it produces. The more popular a program is, the more Tandem can charge for it. Of course, if they

charge too much, the stations or networks can no longer make money, and Tandem will not be able to sell the program. Programs tend to make a profit through syndicated reruns. After a popular program has run on the commercial networks in prime time, it can be sold to syndicators, groups of stations, or individual stations. The production company usually recoups only its production costs from the initial run of the series. Rerun income becomes the critical point of profit. From the initial concept through the final episode, the goal is to produce a long-running program that will retain its popularity over the years in order to sustain a long and profitable rerun cycle in syndication.

In our discussions with both commercial and non-commercial programming executives, one aspect of the important role of the producer became clear. It is the producer -- either the independent commercial producer or the producer working within the network or PTV production framework -- who brings most program concepts forward for consideration at initial stages of development. Network and public television programmers read literally hundreds of proposals and scripts for every one that eventually becomes a program; and for the most part, the flow of ideas is upward from writers and producers to networks and sources of production funds. The major exception to this pattern is material that has already been produced. Syndicators and underwriters are constantly searching for successful or potentially-successful material that has been produced and aired abroad, produced for release in movie theaters, or previously aired on commercial television. The classic pattern for over two decades has been foreign television operations purchasing American programs for use abroad. ("I Love Lucy", "Dick Van Dyke", "Bonanza", and "Kojak" are very popular in many nations. However, in the area of arts and cultural programming, there is a significant flow from other countries to the United States. Because of the common language, the highest proportion of such material is British -- from both the BBC and the independent (commercial) British television systems. However, dance, opera, and symphony performances have been obtained from other nations, and there have been several dramatic series (e.g., "The Life of Leonardo Da Vinci") that were dubbed into English from another language. In the area of arts and cultural programming, the role of the producer as generator of initial concepts is a critical early part of the decision-making process. Programs that have already been produced abroad form an important component of the cultural programming that is available on American television (especially public television).

"ARTS AND CULTURE" AND TELEVISION TERMINOLOGY

One of the major tasks of this project was to determine how the phrase "arts and cultural programming" was understood in the television industry and whether the term was used. We quickly learned in the course of our interviews that we were dealing with the differences between conceptual definitions and operational definitions. The concept of "arts and cultural programming" proved difficult to discuss in abstract terms. On the other hand, people were usually willing to give examples of programs that they might associate with such a term -- even if they indicated that they never used the term. The ability to cite examples or to put specific programs in or out of an "arts and cultural" category is the reason that we have been able to quantify estimates of the amount of such programming. The difficulty in using the term and providing generally accepted abstract conceptual definitions places limitations on the broad discussion of "arts and cultural" programming.

The phrase "arts and cultural programming" is not generally used in the television industry. When asked what they thought it meant, our respondents gave a variety of answers, most of which indicated that an attempt at definition was difficult and of dubious utility. Despite this negative aspect, there was some consensus about the types of programming that might fit such a category; and a number of people were willing to give us their thinking about the subject.

A starting point may be found in the descriptions of "arts and cultural programming" given by Michael Rice, General Manager of PTV station WGBH; Fred Barzyk, a PTV producer; and several others in public television. In one form or another, these people proposed that "arts and cultural programming" includes several distinct components. There is television as a medium for presentation of performances in other art forms - especially drama, dance, and music. There is television programming <u>about</u> the arts. There is the use of the TV medium as an art form. Despite the fact that we beg the question, "What is art?", this threefold conceptualization offers a basic typology by which one can attempt to classify "arts and cultural" television.

Performance programming is one of the staples of public television and finds rich exposure and a reasonable level of financial support there. Certainly, any measure of "arts and cultural programming," and any understanding of the use of that phrase would subsume the broadcast of symphony concerts, dance recitals, operas, and certain dramatic performances. Here we begin to get into trouble. Dramatic

performances on television cover a wide range of material. If we include PTV's "Classic Theater", shouldn't we include "Madame Bovary"? If so, shouldn't we include "Upstairs, Downstairs"? If so, shouldn't we include NBC's "Captains and Kings"? If so, why not ABC's "Rich Man/Poor Man"? If so, why not CBS' "The Waltons"? Or "Kojak", or "Maude", or "The Bionic Woman"? One approach would only include performances of dramatic works that were not originally written for television in the "performances" category of "arts and cultural programming". Original teleplays and series would have to be considered in the "television as art" category.

The second area of "arts and cultural programming" on television includes programs that are about the arts. Reviews, tours of museums, and discussions of literature, drama, film and video art, dance, music, painting, sculpture, architecture, etc., would all fall in this category. Although this category is relatively easy to define, it is relatively difficult to find much programming that falls within it. Review segments of news programs and the occasional public television program and the rare commercial television special about a "visit to" a place of artistic relevance are the only examples that come to mind. This category made sense in an abstract way to commercial broadcasters, but it did not seem to be relevant to the type of programming they were interested in developing.

Television as art is a concept on which there is very little agreement within the industry. On one hand, there is the view that all material made for television is part of an art form. On the other hand, there is the conception that the only case in which television per se can become art is when it is used to generate patterns of color and sound that are not necessarily material intended for broadcast over the airwaves. This paper is not the place for an extended discussion of the nature of art. Simply stated, we were unable to discover a common understanding or usage of the notion of television as art.

The different people who discussed the issue with us approached the questions of "arts and cultural programming" from their own perspectives. The representatives of both IBM and Hallmark emphasized the face that they are not looking for a particular type of content for programs they support. Rather, they want programs that will help the company's sales and/or the company image.

For IBM, the goal is a program which reaches business decision-makers. Whether the program is public affairs, "arts and cultural," or anthropology does not matter as long as it will be appealing to the target group and of high

quality. In order to be most effective, however, IBM does not and would not sponsor just one type of content, but seeks to reach the broadest possible section of its target group by using a variety of formats and contents. Listed below are television shows underwritten or sponsored by IBM from June, 1972, to August, 1976:

PBS	Commercial TV
"Sleeping Beauty"	"Leonardo"
"Leonardo"	"Much Ado About Nothing"
"Harlem Ballet"	"Don Quixote"
"Nephretiti"	"Man for All Seasons"
"Louis Armstrong"	"Glass Menagerie"
"Much Ado About Nothing"	"Clarence Darrow"
"Spelling Bee"	"Scrooge"
"Eames Celebration"	"Love Among the Ruins"
"Clarence Darrow"	"A Girl Named Sooner"
"Finest Hours"	"Eleanor and Franklin"
"Bill Moyers"	"Best of the Fourth"
"Tribal Eye"	"Face the Nation"
"Behind the Lines"	"Agronsky and Company"
"Tall Ships"	

In short, IBM does not use the phrase "arts and cultural programming" because it does not approach broadcast sponsorship with specific topic areas in mind. When IBM finds a property of high quality with the potential to attract the right kind of audience, it purchases or develops the property and airs. Thus, IBM can sponsor everything from "Louis Armstrong", to "Much Ado About Nothing", to "Face the Nation". The criteria is the audience they expect the program to draw based on past performance of similar types of programs.

At Hallmark, the reason for broadcasting sponsored programs on television is the same as at IBM, but the target audience is different. For Hallmark, the target is the family. Bill Johnson, head of Hallmark advertising, felt that "arts and cultural programming" would include a variety of content so wide as to be unclassifiable, thereby rendering the term essentially meaningless. He did, however, have a list of types of content that Hallmark felt was most appropriate for family viewing -- "for Hallmark to present as a visitor in the family living room." Plays, dramatizations, musicals, opera, and historical material were all suitable. Following is a list of some of the dramatizations of history which have won awards for the "Hallmark Hall of Fame" in the last 25 years. (Altogether the "Hallmark Hall of Fame" has won a

total of 147 awards, including seven Peabody and 45 Emmy Awards, plus two special awards from the Academy of Television Arts and Sciences.)

"The Gathering Storm"
"Elizabeth the Queen"
"Barefoot in Athens"
"Magnificent Yankee"
"Eagle in a Cage 1"
"The Other World of Winston Churchill"
"The Patriots"
"Crown Matrimonial"
"Saint Joan"
"Lamp at Midnight"
"Inherit the Wind"
"The Holy Terror"
"Abe Lincoln in Illinois"
"The Invincible Mr. Disraeli"
"Victoria Regina"

For producers, the phrase "arts and cultural" programming seemed to have more importance, but still no discrete identifiable meaning. Lorne Michaels rebels against the phrase, stating that "it excludes everything done after the 17th century." Live television, minimalist paintings and experimental cinema all require artistic shaping and cultural background, but the phrase "arts and culture" is just too confining. He also felt that the nature of the medium in which a work is presented has a great effect. A play might be great on stage, but the same play done for television might be nothing but a copy a program about "art" that is not itself artistic. He felt that to talk about art and its meaning was possible only when one was not engaged in producing it.

At Tandem Productions, Al Burton also saw little meaning in the phrase "arts and cultural" programming. For Burton, the phrase was an umbrella which sheltered a variety of vehicles ranging from traditional art (e.g., 17th century painting) to the first viewing of any new television program. Burton refused to categorize any television program currently on the air as not being arts and cultural. He felt that the first viewing of any program was an artistic experience due to the enormous amount of creative expertise and judgment that goes into each television show.

Specific programs which Tandem produced and which Burton thought fit under the "arts and cultural" umbrella included "All's Fair" (for its political and intellectual content) and "Mary Hartman, Mary Hartman" (ephemeral art).

At the commercial networks, there was a willingness to discuss the concept of "arts and cultural" programming; however, it was clear that the phrase had little use in the context of network programming activity. Bill Storke, who is in charge of specials for NBC, felt that television can be a creative outlet for high quality talent; but he also noted

that the "selective arts" (by which he means those with limited appeal, such as opera and ballet) are inappropriate for a full national network. Presentation of such material on public television, on the other hand, is better than not having it available at all. Bob Boyett of ABC indicated that within his network, the terms "arts" and "culture" have negative connotations because they are associated with low ratings. He feels that there is some room in commercial television for programs that bring "prestige" to a network despite relatively low ratings, however, the presentation of "tasteful" programs may be a part of the responsibility of commercial television and something that can be afforded when you are successful. Thus, with ABC's recent success in ratings competition, that network may become involved with a few additional "tasteful" programs per year. (To extend the argument, we might expect the amount of such programming at CBS, which has had a very bad year in the ratings, to decline. Traditionally low-rated ABC has consistently broadcast the fewest "cultural" specials, while formerly high-rated CBS has tended to broadcast the most in recent years.

Public television has developed a number of content-coding schemes for describing its programming. Some of the categories used can be applied to "arts and cultural" programming. At the most elementary level, the financial data released by the research department of PBS divides program production funding by three types of programming: "cultural," "educative and children's" and "public affairs." By this reckoning, "cultural" programs accounted for about a third of all hours distributed by PBS in fiscal 1976. A more ambitious coding scheme has been developed for a planned program date retrieval system. The variable describing content by "subject" lists the following categories:

History: U.S.
World
Music
Art

Literature

Drama

Poetry

Visual Arts

Music: Classical
Popular
Jazz
Rock
Folk
Other

Opera

Dance

Sports

Biography

Public Affairs

Comedy

Satire

Religion

Philosophy

Crafts and Hobbies

Other Arts & Humanities

Food Preparation

Travel

Health

Language Arts

Science: Natural
Physical

Medicine

Mathematics

Geography

Life Coping Skills

This scheme has not yet been implemented. It contains a great number of proposed categories, many of which seem to fall in the "arts and cultural" area. However, it still leaves a few areas open for debate. Should "satire" be included (and how does it differ from "comedy")? Is a dramatized novel "literature" or "drama"?

A different coding system has been in use for several years as part of a CPB/National Center for Education Statistics project to collect biennial data on public television program content. The system first divides programs into two groups: general and instructional. Then it divides each group by program type as follows:

General Types	Instructional Types
News/Public Affairs	Children's Basic Education
History/Biography	Reading and Writing
General Information	Literature and Humanities
Science	Foreign Language
Skills	Mathematics
Children's	Natural and Physical Science
Culture/Art/Reviews	Social Science
Drama Performance or Series	Music, Art and Theater
Feature Film	Home Economics/Consumer
Comedy/Satire	Health, Phys. Ed, Safety
Variety	Environment
Sports	Teacher Training
Station Promotion	Professional Training
Other	Other Career/Vocational
	Other

Among the general program types, "culture/art/reviews", "music/dance performance", and "drama performance or series" would clearly seem to be part of an "arts and cultural" category, although there might be programming in some of the other categories that some people would also want to include. Among instructional program types, "literature and humanities" and "music, art and theater" should probably be included in the arts and cultural typology.

The quantity of public television programming in each of these categories will be presented in a later section of this paper.

SUPPORT FOR "ARTS AND CULTURE"

It is difficult to get precise estimates of the amount of money that is spent for "arts and cultural" television programming. Another is the difficulty in defining which expenses should be included in a total price for such programming. Should one include only production costs, or add costs of network technical services, promotion costs, overhead, and local station operating costs? Given this difficulty, we can still take a number of approaches to the question of "support" available for such programming.

In the last few years, there have been roughly 40 network programs per year that can be put into a broad "arts and cultural" category. The probable average length of these programs is 90 minutes. Industry estimates on the cost of production for such material ranges from $400,000 to $600,000 per program. At that rate, perhaps as much as $20 million per year is being spent to produce network programming of a cultural nature. We have been unable to get a clear program-associated estimate of promotional, technical, and overhead

costs for these programs. However, such costs can easily double or triple the total amount spent on such programming. Expenses on such programming at the local and non-network levels are even more difficult to obtain. A guess might assign several million dollars a year to such programming.

PBS has provided data that give a fairly clear picture of the amount of money spent for the production and purchase of "cultural" programs distributed nationally to public television stations. This total does not include the cost of any non-production factors involved in programming; nor does it include the cost of local public television production and acquisition of "arts and cultural" programs. Funding for "cultural" programs distributed by PBS in fiscal 1975 came to a total of $12 million (of a total $49.7 million for all programs, or 24 percent). In fiscal 1976 funding for PBS' cultural programs more than doubled to reach a $25.4 million level that was 43 percent of the $59.1 million spent on the production and purchase of programs for PBS distribution.

Table T-1 below presents a breakdown of the sources of funding for PBS-distributed cultural programs in the last two fiscal years.

Table T-1 National PTV Funding Sources
($ in millions)

Source	Fiscal 1975	Fiscal 1976
Local Stations	$ 2.1	$ 4.5
CPB	2.0	1.3
Federal	0.4	4.2
Foundation	1.9	2.6
Oil Companies	3.4	8.3
Other Companies	1.8	2.0
Other	0.6	2.8
Totals*	$12.0	$25.4

* - Columns may not add to totals because of rounding.

Local stations have significantly increased their outlay for the production of cultural programs in the past year through participation in the station program cooperative and in the purchase of the Janus Films movie package. The increased federal support reflects funding from the National Endowment for the Humanities for "Adams Chronicles" and "Classic Theater", and funding from the National Endowment for the Arts for "Dance in America" and "Live from Lincoln Center". Foundation support mainly reflects the contribution of the Mellon Foundation to "Adams Chronicles", and the Ford Foundation support of KCET that was used for "Hollywood Television Theater". Money from oil companies came mainly from Exxon for "Great Performances", "Live from Lincoln Center", and underwriting of the Janus Films package; Mobil Oil for "Masterpiece Theater", "Classic Theater", "Picadilly Circus", and "The Way It Was"; and Arco for "Adams Chronicles", and "In Performance at Wolf Trap". Other sources of support included Volkswagen of America for "Autobiography of a Princess", Raytheon for "Evening at Symphony", and E. F. Hutton for "Olympiad".

Examined from another perspective, the PBS data reveal that funding for cultural programs in fiscal 1976 represented 29 percent of the money spent by the stations on national programming, 42 percent of the money spent by CPB, 30 percent of the federal money, 37 percent of the foundation money, and 74 percent of the corporate underwriting for the production and purchase of national PTV programming.

Corporate underwriting represents nearly half the support (from sources other than the stations) for cultural programs on the national PTV system in fiscal 1976. Yet the corporate underwriters do not necessarily support all types of "arts and cultural" offerings. Frank McKevitt of Visualscope, a consulting firm that screens, buys, and develops properties for Xerox, Mobil and Travellers Insurance, feels that certain corporations are "enlightened"; but their support of high quality material on television is done with clear commercial motives. "Enlightened" corporations realize that there is an economic value to prestige and public image. McKevitt's company helps its clients become associated with television programs that aid the development of the corporate image as well as selling their products. Xerox, for example, feels that its support of certain projects may even help with its college recruitment program. Through Visualscope, clients purchase rights to programs produced abroad. These are then either brought to public television (e.g., Mobil's "Masterpiece Theater") -- although the official line is that the PTV station buys the property with money from

the underwriter -- or they are placed on commercial television stations (e.g., Mobil's "Ten Who Dared", or the Xerox project "The Long Search" about the development of the world's religions).

At both IBM and Hallmark, it is sales and not philanthropy that motivates support for the type of high quality programming that might be referred to as "arts and cultural". Both of these companies support programs of this type from their advertising budgets. For IBM, the specific goal is to present a good corporate image of IBM (rather than to push any one particular product). IBM chooses high quality programs because such programs draw an audience with the kind of up-scale (affluent, educated) demographics they believe includes the executives who make decisions affecting the use of IBM products.

IBM would like to continue to sponsor high quality programs, but the extent to which they do so is dependent on the amount of acceptable material available. They have no dollar commitment that they must spend every year. They budget a certain amount and try to find material; but if no acceptable material can be found, or if they find some but not enough, they choose to wait rather than broadcast a program that is not up to their standards.

At Hallmark, the sales pitch is more direct. The Hallmark Company spends an estimated 75-80 percent of its advertising budget (approximately $3 million) on producing and promoting the four to six "Hallmark Hall of Fame" programs it airs each year. Generally, this money is enough to purchase only rights for one or two plays of the material. During the "Hall of Fame" programs, commercials are run promoting various product lines (candles, writing equipment, and, of course, greeting cards). The "Hallmark Hall of Fame" programs are scheduled just before holiday seasons (Thanksgiving, Christmas, Valentine's Day, Easter) when greeting cards are likely to be sent or other products purchased. Over the years, Hallmark has not been able to increase its budget for the "Hallmark Hall of Fame" at a rate equal to the growing expense of television time and production costs. If television costs continue to escalate at current rates, it is likely that fewer episodes of the "Hallmark Hall of Fame" will appear each year.

While both Hallmark and IBM view their involvement in high quality programming as advertising, it is a special kind of advertising that is not directly related to sales dollars. Bill Johnson said that at Hallmark they "do not run out and count the money in the cash register the next day," to see

whether their program was successful. Instead, Hallmark views the "Hall of Fame" in terms of long-range goals such as identification of high quality with Hallmark and the association of specific lines of goods with the appearance of the Hallmark symbol on a store window or sign.

The producer's view of sources of support is much more direct than that of a company or corporate sponsor. For both Lorne Michaels of "Saturday Night" and Al Burton of Tandem Productions, support is directly related to the bottom line -- money. The profitability of a program is directly related to the number of people who view that program. The reason Michaels was brought in to produce a show for NBC was that he had produced other shows that were successful in obtaining good ratings. The late night slot on Saturday had performed poorly for NBC, and they thought Michaels might be able to devise a program that would be successful in attracting a large number of viewers, especially young viewers.

Al Burton spoke of two kinds of success for programs which Tandem has produced. There is the kind of success where a program "works," meaning that it is a "high quality" program. And there is the kind of program that gets good ratings. Both "Mary Hartman, Mary Hartman" and "Hot L Baltimore" were successful in that they "worked," but "Hot L Baltimore" had bad ratings and was cancelled. Burton said that for a show to be a real success, it has to succeed on both levels. Without good ratings, a program cannot remain on the air whether it "works" or not, while most programs that don't "work" do not get good ratings.

For Burton, "good ratings" is a relative term, the meaning of which is dependent on the type of distribution the program receives. In the case of "Mary Hartman, Mary Hartman", for example, its ratings are low compared to commercial network prime time ratings. But the program is generally sold to independent stations which run it after prime time. In this situation, the program can be successful with a relatively small audience because no program has very high ratings in the late fringe time and, more importantly, because the independent stations can make a good deal of money with it. Ratings are relative to income.

For all commercial entities, from networks to production companies to corporations, there is a disinclination toward philanthropy. Arts and cultural materials are broadcast because they fulfill a certain purpose -- they attract a certain kind of audience, they create a certain kind of impression. Arts and cultural programs are supported for

the dollars (real, imagined, or potential) that the sponsors and underwriters believe they ultimately will bring in. If a program is considered to be "high culture," or if it receives rave reviews, that is icing on the cake, not the raison d'etre.

A case in point is the attempt to obtain corporate underwriting for the public television series, "Visions". The series is an ambitious multi-million dollar project to produce new television dramas written, directed, and acted by new young talent. Initial support for the project was generated by CPB and the National Endowment for the Arts. However, the nature of the project -- which featured avante garde and controversial subject matter from relatively unknown talent -- is such that there has been no success in the attempts to obtain partial support from corporate sources. According to Don Quayle of CPB, underwriters want material that is attractive and non-controversial. They do not want untried ideas.

Arts and cultural programming can be supported for non-money motives with funds from within the public broadcasting industry. Both the local stations -- through the program cooperative and the acquisition market -- and CPB can support projects for which there is a perceived "need" even if the programming is not necessarily non-controversial or likely to draw a particular audience. Thus, CPB has funded "Visions" and the stations have purchased Ingmar Bergman's "Scenes from a Marriage" through the program cooperative.

The two national endowments (arts and humanities) have become increasingly active in the support of television projects that fall in the arts and cultural category. The Media Arts Program of the National Endowment for the Arts has supported a project that supports "film, television, or radio series designed to showcase the work of individual artists, or performing or visual arts groups, or museums; or to present specific art works or art movements." Matching grants, not to exceed $50,000, are available for a pilot program. Grants for partial support for a full series have no set maximum. The National Endowment for the Humanities has a $7 million media budget. Not all of this money is for television; but that medium gets the bulk of the funds. The Media Program of the Endowment is "for qualified applicants seeking funds for an organized project which, by use of electronic media or film, provides knowledge and understanding of the humanities for a broad adult audience." People at the Humanities Endowment stressed that their program is intended to bring together humanists and media professionals for the purpose of creating projects that make

the work of humanists known to the public. Since much of the work of humanists is in areas that would generally be acknowledged as cultural, this program is an important source of support for television programming of this type.

There are differences in approach between the Arts and Humanities Endowments. The Arts Endowment stresses that its support is in the form of matching grants and partial funding. This means that a project must also obtain support from an additional source or sources. The Humanities Endowment will fully support projects through the course of a multi-stage funding process from planning and development grants through pilot grants, acquisition grants, and production grants. Among people we talked with in public television production and development, there was a rough consensus that the Arts Endowment has simpler procedures and requirements, but less money. The Humanities Endowment, on the other hand, is thought to have funds to support more ambitious projects, although its requirements and procedures are said to be more difficult. (This is a producer/broadcaster viewpoint. The Humanities Endowment requirement of "clear evidence that the involvement of scholars in the humanities has occurred in the development of a proposal" is not something familiar to these producers and broadcasters.)

One other aspect of support for arts and cultural programming should be considered: the cost and acquisition of replay rights for television programs that have been produced and aired in the past. Broadcast television is an art form that exists in time -- programs are transmitted under agreements with talent (actors, writers, directors, etc.) that stipulate rates of pay for a certain number of telecasts. If certain programs are to be considered works of art, and if certain programs are considered to contain material of cultural value, then one way to support arts and cultural programming would be to support the extension of repurchase of broadcast rights to such programs. For example, public television negotiated for the rights to rebroadcast the award-winning drama, "The Andersonville Trial", originally produced by KCET. The process involves getting agreements from many people and paying them for the right to reuse their work. The other side of the coin is shown by the presentation of several "Hallmark Hall of Fame" programs on public television. These shows had orginally aired on NBC. Hallmark owned rights for a second national telecast within a specified period and determined that these rights could not be successfully utilized on commercial television. Thus, the programs were given to PBS. Public television usually obtains rights for the release of a program -- which means that stations can transmit the program more than one time in a seven-day period. However, Hallmark did not have such rights; so its programs had only a single public television telecast.

It was the feeling of several people that support of arts and cultural television programming should include support of the extension of rights to broadcast programs with artistic or cultural value. Just as classic films are preserved and shown again and again, it was suggested that there are classic television programs that should be available both for rebroadcast and for distribution by way of non-broadcast video systems such as cassettes and videotapes.

METHODS OF ESTIMATING AUDIENCES

Audience estimates are obtained by the same methods for all types of television programs. Cultural programs, news programs, situation comedies, police shows, and live sports events all are subject to the same methodology. In general, ratings are determined for many programs -- on different stations over a period of time -- in a single survey or by a single audience measurement device. There are a number of techniques in use for estimating the size and composition of audiences for television programs. The most important:

1) The national rating service provided by the A. C. Nielsen Company in almost every week of the year for the three commercial networks.

2) The ratings for local markets provided in designated months by both Nielsen and Arbitron service of the American Research Bureau.

3) The local Nielsen metered service for the three largest metropolitan markets in the country. (Subsequent to the preparation of this paper, Arbitron instituted its first metered service in Los Angeles. The system is essentially the same as the Nielsen system described here.)

There are other techniques for determining ratings; however, the above services dominate the television industry and are used as the standards of audience measurement. Each of them provides a somewhat different type of information about the audience; a number of different variables must be considered for an understanding of audience measurement.

THE NATIONAL NIELSEN RATINGS

The A. C. Nielsen Company provides the Nielsen Television Index (NTI) service which indicates the size of the national audience for television programs. These are the key ratings which are used by the commercial television networks to determine the success or failure of national programming. In addition, there is a parallel National Audience Composition (NAC) service from which Nielsen obtains demographic information about audiences.

Survey Method. The NTI sample is based on the U.S. Census Bureau's records of census tracts in the country. Nielsen selects approximately 1,200 households in all parts of the nation from a pre-designated sample drawn from lists of census tracts. The Nielsen field staff contacts the pre-designated homes and attempts to get them to accept audimeters in their homes. Roughly 75 percent of the contacted homes agree to become part of the sample. When a household refuses to join, the field staff attempts to obtain a sample home in the same neighborhood. In addition to the national sample of homes with meters, a parallel and larger sample of homes Nielsen places diaries in for its National Audience Composition (NAC) panel. The NAC sample is selected in a similar manner to the NTI sample (geographic sampling), but there are two NAC homes in a neighborhood and the rate of acceptance is about 60 percent of pre-designated homes. Again, systematic substitutions are used to place diaries in homes similar to those that do not wish to cooperate. In both the NTI and the NAC samples, small financial incentives are given. The NTI panel is upgraded for shifting population patterns and it is replaced completely over a five-year period. The NAC panel is similarly upgraded and there is a 33 percent sample turnover per year.

Among the positive aspects of NTI/NAC sampling: the use of all household units, rather than telephone numbers, as a sampling frame, is probably more representative of the population; the use of field staff to place meters and diaries results in a better response rate than that achieved by phone and mail techniques; the sample size is sufficient to represent the whole population within a reasonable range of statistical sampling error; the use of a panel allows careful monitoring of patterns and certain analyses that would not be possible in surveys which reach a given sample member for a week, an evening, or a given moment. Among the negative aspects: homes in the panel may become unrepresentative of the general population as time goes by, either because of shifts in the population characteristics, or aging of the people in the panel homes, or because being in the NTI/NAC sample causes people to change their viewing habits. Due to the non-response rate, the sample is not a perfect probability sample and the viewing biases of non-cooperators cannot affect the ratings if they are different from the pattern for cooperating households. (This is a problem with all survey techniques. Higher cooperation rates yield greater validity.)

Meters. The key to the data collected by Nielsen for national ratings is the "audimeter" attached to each TV set in homes in the NTI sample. This device records whether or

not a set is on, and which channel it is receiving. The meters are linked by telephone lines directly to Nielsen's computers. Thus, no response is required by anyone in the home, and the meters are as close to an unobtrusive viewing indicator as anything yet devised.

The major advantage of meters is that they do not require anyone to fill out forms or answer questions. However, they have a severe limitation. Knowledge that a set is on and tuned to a channel is not knowledge about people watching television. Nielsen collects demographic data about the households in the NTI sample: income, presence of children, age of the lady-of-house, education of head-ofhouse, etc. Meter-gathered data can then be used to give viewing patterns among different types of households. However, the NTI meters alone cannot report anything about who was watching. That information, on a national level, comes from the NAC sample.

National Diaries Plus "Recordimeters". The NAC sample is given a diary for each TV set in the home. Respondents are supposed to fill in all programs viewed by all household members. In addition, a "recordimeter" is attached to each set. It measures the number of hours the set is in use and produces "an audio/visual reminder signal" every half-hour of set use to encourage diary entries. Entries in the NAC diaries represent reported quarter-hour-by-quarter-hour viewing by all household members; efforts are made to have the totals of set-in-use hours correspond to the amount registered by the recordimeters.

Data Reported. A wide range of data is reported by the NTI/NAC service. At the simplest level, the NTI meters are used to estimate the percentage of all U.S. homes with TV that were watching a given network, this is known as a rating. From this, an extrapolation estimates the number of homes in the audience for a program. National ratings for non-network programs, whether on public television or independent commercial stations, or in non-network syndication to network affiliates, are more difficult to obtain. The meters indicate the households watching different stations across the country. Ratings for a program can only be computed by matching information about which homes in the NTI sample were tuned to those stations. In practice, this has made the computation of national PTV ratings a slow and costly process. At the most complex level, there is the NTI/NAC "Audience Composition Report" issued at regular intervals. This combines the data from the two samples to give precise estimates of viewing by different kinds of people (from NAC information about age and sex) in different

kinds of households (from NTI and NAC information about income, education, region of the country, etc.). It is assumed that the NTI data are the most valid indicators of viewing hours, and the diaries are weighted to conform to metered data.

In a middle range of complexity, the NTI metered data have been used to generate audience estimates within household typologies. Thus, ratings can be generated for homes at a given income level, homes in a given region, homes with the lady-of-house at a given age level, or homes with and without children. For the most part, demographic analyses of national public TV audiences have been based on these household characteristics. Technical problems of matching carriage by stations with metered viewing of stations are already great; the cost of a further mixture of NAC diary data into the computation is probably prohibitive.

Another type of data made possible by a metered panel is cumulative audience over extended time periods. Local market diary reports cover only one week per home, and the NAC panel is not used continuously; but NTI meters can compute cumulative household viewing over any period of time. Thus, public TV has issued reports on its "four-week cume" -- the percentage of households viewing anything on PTV in a four-week period -- from the NTI sample. Comparable long-term cume data are not available from diary techniques.

LOCAL MARKET RATINGS (ARBITRON AND NIELSEN)

Both Nielsen and Arbitron provide ratings for local television stations by "markets." The Nielsen service is known as the Nielsen Station Index (NSI); its reports are called "Viewers in Profile" and appear in "VIP books" for each market. Arbitron provides "Television Market Reports", which are generally called "Arbitron books", for each market. Since the two services are quite similar in their basics, a single description can serve for both.

Survey Method. Both services divide the United States into approximately 200 television markets. These are non-overlapping and cover all counties in a contiguous 48 states. (Hawaii and markets in Alaska are sometimes surveyed as well.) For the most part, the county is used as the basic geographic unit to define markets; however, in a few cases, counties are divided and portions are assigned to different markets. The NSI service refers to these non-overlapping

areas as Designated Market Areas (DMAs) and the Arbitron service uses the term Area of Dominant Influence (ADI). In both cases, the basic concept is that households in the DMA or ADI are assigned to a market on the assumption that they are most heavily influenced by local media from an urban center or centers within that market. Counties are used as the basic geopolitical building blocks for market surveys. Random samples are drawn within each county. The number of homes sampled in a county is determined by the size of the market and the proportion of the market's population that resides in the county. Statistical weighting procedures are applied to county samples so that the overall sample for a market is representative of the entire area.

The key to the local market audience reports is the diary that is placed in each home on the NSI or Arbitron sample; and the key to the survey method is placement of these diaries. The number of diaries to be placed in each county or sub-county unit is predetermined on the basis of required sample size and population distribution. Previous history indicates the expected rate of return for each county, so enough sample homes are chosen to insure an adequate number of returned diaries. Both rating services use telephone solicitation to help place diaries. The sample is drawn from among homes with telephone numbers. (The procedure for drawing the sample is quite complex; and NSI recently began using a procedure which also brings homes with non-published numbers into its sampling frame.) Phone calls are made to prospective sample homes to enlist cooperation. (Arbitron precedes the phone call with a letter.) The calls also help determine the number of television sets in the home. Then diaries are sent (one for each set) along with "a cash incentive" -- usually 50¢ per diary. Arbitron makes two additional contacts by phone to make sure the diary has been received and that no difficulties have arisen. The final stage of the survey is in the hands of the diary recipients. They must complete and return the diaries. A spot check we have conducted for a number of local market reports from both rating services indicates that the response rate varies from 48 percent to 60 percent of initially-designated sample homes. The typical rate is in the middle of this range (i.e. about 54 percent), and the variation seems to reflect market-by-market differences. Both rating services seem to get similar rates in the same market.

Diaries. Attempts have been made to design viewing diaries that are simple to understand and easy to use. The diaries are small booklets that have pages covering a seven-day period. The NSI period begins on a Thursday, the Arbitron period begins on a Wednesday. Days are divided into fifteen-minute periods, and respondents are asked to indicate

whether the set was on or off; if it was on, they are asked for the channel, the program, and members of the household who were watching. All the information can be indicated with simple marks on the diary form. The front page of the diary asks for the age and sex of household members. These attributes can be associated with viewing by individuals when the diaries are processed. The diaries are designed as self-mailers. Thus, at the end of the survey week, respondents seal the booklets and drop them in a mailbox.

Survey Periods and Sample Size. The local market reports of both rating services reflect data collected over a four-week period. This means that each rating book includes data from four samples of households, each of which supplied viewing diaries for a period of one week. Over the four-week period, most urban markets reflect a tabulated response based on between 800 and 1300 diaries for the market area (DMA or ADI). This means that between 200 and 325 households are sampled per week in a market. Both rating services produce November, February, and May reports for all local markets. These four-week periods (especially November and February) are known as the major ratings "sweep" periods; and competition for audience is especially fierce during the sweeps. In addition, almost all markets are surveyed with smaller samples for abbreviated July reports. And a smaller number of markets are surveyed in October (NSI=23 markets, ARB=33), December NSI=5, ARB=3), January NSI=18, ARB=22), and March (NSI=8, ARB=7). Over the course of a year, we estimate that the two rating services collect data from as many as 1.4 million households. (This means that the initial contacts reach over two-and-a-half million homes.) While the sample size for a single week in a small market may be relative small, data which are aggregated over four weeks and/or over several markets or several sweep periods tend to provide stable, reliable estimates of audience size and composition.

Non-response bias is the major problem with the local market rating system. Nearly half of the initially designated sample is not included in final tabulations. Thus, if homes that refuse to participate have viewing habits that differ from viewing habits in participating homes, local ratings will not be valid estimates of actual viewing in the total community. For example, if participating homes are more likely to watch Program X than refusing homes, the rating for Program X will be higher than tha actual viewing level in the entire population.

Data Reported. Each local market report contains a wide range of audience data. One of the most important sections of the report is the part which presents audience data by time period by day of the week. For a given time period -- averaged over four weeks, although specials are sometimes broken out -- a rating and an audience share is given for the programs on all stations in the market meeting minimum audience size criteria for reportability. These ratings and shares are reported as percentages of both the market area (DMA or ADI) and a smaller "metro" area, which tends to represent counties that are a more integral part of the central urban/suburban core of the market. In addition, both rating services report estimated thousands of viewing homes for each program in an even wider geographic area. These are presented as station totals, rather than percentages; and they are estimated from diaries both in the market area and in counties that are included in adjacent markets. (Thus, a home might be in a county in the New York City market, but if it is tuned to a Philadelphia station, that viewing would be included in the total for the Philadelphia station.) Total audience figures and market percentages are also presented for a number of age/sex categories. This allows the local books to present estimates of the number and percent of men, women, and children watching a particular program. (Note that the diary method collects important data about persons viewing each program; but does not collect information about household characteristics such as income.)

Another area of reported data has become particularly important to public television stations. The local market reports present cumulative household audiences for each station in the market for a number of "dayparts." Thus, it is possible to determine how many homes watched a station at least one time in a week during the prime time daypart, or over the total sign-on/sign-off period. Since the average audience for public television tends to be low for any given program, PTV stations have begun to use these cume measures as indicators of relative success. The cumes are presented both as percentages of the smaller metro area (NSI) and as a total number of homes watching the station, regardless of market (NSI and ARB). A simple arithmetic formula allows the computation of frequency of viewing from cume and average audience data.

The data in local market reports are limited in a number of ways. In addition to problems that may have been introduced because of the telephone sampling frame and non-response biases, the technique does not allow for the development of certain information. Since the diaries cover a single week,

it is impossible to compute cumes for a period of longer than a week; it is not possible to determine unduplicated viewing unless each sample home is monitored over the entire period desired. Thus, four-week cumes for local markets (diary method) cannot be developed for comparison with national four-week cumes from the metered sample. A second lack of information has already been mentioned: there is no information in this system about the socio-economic status or educational level of homes in the sample. Recent steps have been taken by both services to gather information about specific ethnic groups. Another limitation is imposed by the schedule of survey periods: when there is not a ratings sweep, there are no local ratings for programs that were broadcast. In most markets, this means that there are not ratings during 36 weeks of the year; and even in most major markets, there are no local ratings for over half of the year. This problem does not seem to disturb commercial broadcasters, who are most interested in the audiences for their regular series. However, it means that specials and mini-specials on public television and independent commercial stations often have no audience measurement when the national Nielsen service cannot be used.

LOCAL METERED MARKETS

In recent years, the Nielsen Company has installed audimeters in samples of homes in New York, Los Angeles, and Chicago. Arbitron is planning to inaugurate a local metered service in the near future. Like the NTI/NAC system, the local metered service combined diaries in some homes with meters in others to produce local NSI reports for these three markets that are the same as reports for other markets. However, the metered service also provides an automatic teletyped overnight rating for all programs that were broadcast on the previous evening. The meters are always in operation, so there are local ratings in these three markets for every day of the year. This means that information will be available about the local audiences in New York, Los Angeles, and Chicago for any special or any episode of a series; and the information will be available very quickly.

OTHER AUDIENCE MEASUREMENTS

At present, the Nielsen and Arbitron services dominate the industry. Even so, there a number of techniques in addition to the Nielsen metered sample and the NSI and Arbitron local market surveys.

Telephone Coincidental Surveys. When simple ratings are desired for a local market in a non-sweep period, it is possible to implement telephone surveys of hundreds of households. A number of organizations are equipped to conduct such telephone polling, and the results provide quick evidence of the audience size for programs on the air at the time of the coincidental survey. The heart of the technique is sampling from a list of telephones and/or a random-digit-dialing approach to non-published numbers. When the phone is answered, two simple questions are asked: Is a TV set on in your home? If so, what program is on?

Computerized Analyses of Local Market Data. Both Nielsen and Arbitron have recently created systems in which they put data from local market diaries into a computer. Users are then able to develop customized analyses by dealing directly with the computer file. The systems allow the creation of cumulative audience profiles for persons and households over any combination of programs within a week; they allow analyses of audience flow from station to station and from set-off to set-on; and they permit the creation of special geographic areas, using combinations of counties that need not conform to defined metro or market areas. It is now possible to use these systems to obtain information that is inherent in the diary samples but is not published in the local ratings books. For example, cumulative audiences for all dramatic programs in a week could be computed, or the rating for a program in selected counties could be obtained.

SOME FINAL NOTES ABOUT RATINGS

The ratings industry is a multi-million dollar aspect of the multi-billion dollar television industry. It exists to provide audience estimates so that commercial television stations can sell commercial time to advertisers who buy at rates determined by the number and type of viewers. The systems have been designed to provide information that is useful for this purpose; and they have been designed to provide such information at an acceptable level of statistical confidence for an acceptable cost. They have not been designed to meet some of the information needs of non-commercial broadcasters or people concerned with television content as a part of the nation's cultural environment. Thus, while the ratings systems can often provide useful information on some issues of concern to the non-commercial world, they are often incapable of giving the best answer to specific questions. Special audience measurement projects are often required; and by comparison with the costs of using existing systems, these are usually very expensive.

Finally, a note should be made about the nature of audience estimates. They are all derived from samples, and they have limitations that come with estimates derived from samples. An adequate statement of the case is made by the July 8, 1965, Federal Trade Commission guidelines regarding broadcast audience claims:

> Audience data are based on sample surveys not derived from complete measurements of audiences. As such they are statistical estimates, and, at best, are of only limited reliability due to errors and distortions inherent in statistical methods yielding such data. Claims as to audience coverage based on audience surveys should therefore be qualified in recognition of the fact that survey data are inherently imperfect.

All ratings are audience estimates from samples for which there are known confidence intervals; and the rating services take great pains to insure that the plus or minus factors for ratings are published and available to clients. In addition, the ratings are not derived from true probability samples, and non-response introduced unknowable biases. On the whole, however, the current systems of audience determination are probably close to the best that can be done for the money spent on them. Given the already high costs of the current systems, it is unlikely that the additional resources for significant improvements will be available in the immediate future.

WHAT ARTS AND CULTURAL MATERIALS WOULD BE USED IF AVAILABLE?

Commercial television simply is not interested in programming which will not attract large, general audiences or audiences that display an "up-scale" demographic quality. Thus, the question of the type of material that might be used if it were available tends to be answered in terms of both the quality and nature of the program and the size and type of audience it might attract. Paul Klein of NBC says it is possible to succeed on commercial television with some types of cultural programming. He feels that certain stars and well known works can achieve acceptable audience levels. On the other hand, he expected that other delivery systems such as pay cable would be better for material of limited appeal for a few viewers with high levels of taste.

Similarly, Bill Storke of NBC expressed the opinion that Shakespeare usually would not work on the commercial networks because the audience size would not justify the cost of the property. (Some Shakespeare has appeared on the networks in the past. For example, "Hamlet" with Richard Chamberlain appeared on NBC in 1970. However, this does not deny that most Shakespeare would not interest commercial decision-makers.) Bill Self of CBS put the issue in a different perspective. His opinion was that there are not enough talented writers and directors to create a great amount of high-quality material that will also meet the standards of required audience levels. At ABC, Bob Boyett confirmed a notion that had also been expressed at the other networks. The issue for commercial network television is not production funds. Boyett (and others in commercial television) felt that more high-quality cultural programming should be produced, but that the appropriate place for it is public television. Boyett's proposal was that a great programming person be hired to produce a high-budget, high-quality project; and this person should be free of local stations and the national system.

Underwriters and sponsors of both public and commercial programs agreed that there is an insufficient quantity of high-quality material. Frank McKevitt of the Visualscope consulting company indicated that there is a problem finding enough good specials for his clients. He also felt that the future of high-quality television is in public television. Both IBM and Hallmark desire more programs that meet their criteria: high quality, and programs that will attract the kinds of audiences they wish to reach.

Chuck Hollister stated that IBM had no pre-determined notions about specific types of material that they would acquire for broadcast. He indicated that IBM would like to sponsor more programming, but that material of sufficiently high quality is difficult to find. It is rare for IBM to find a program idea that has not been done before and reaches the standards that IBM would like to have associated with its corporate image. In addition, when such a program is found, several potential sponsor/underwriters are usually interested in the property. Rather than a specific type of program, Mr. Hollister felt that the need is for a greater number of high-quality programs of the type that already exist.

No matter what the content of a program under consideration for purchase and broadcast by IBM, one if its critical attributes has to be predictability. Before a program is selected, IBM requires an evaluation of its potential audience. For a program like "Love Among the Ruins", they want to know the audience size and demographics of other films featuring Katherine Hepburn. The property under consideration must be comparable to the performance of other programs that have been broadcast. Whether the similarity consists of content, talent, or other factors, IBM is interested in evaluating the risks and likelihood of success (attracting the proper audience) before it makes a decision.

At Hallmark, there exists a well-defined set of program types that are considered Hallmark material. Hallmark will not sponsor programs that are not good viewing for the whole family. To them, this means no excessive sex or violence, homosexuality, rape, prostitution, or other adult themes. They feel there can be merit in programs containing themes of these types, but they are not themes Hallmark wishes to present. In addition, Hallmark wants to present material that appeals to the whole country. One "Hall of Fame" consisted of an English drama in which Hallmark felt the English accents precluded people living in the American "bible belt" from understanding and enjoying the program. Thus, although the program received glowing critical reviews, the Hallmark people were dissatisfied. Hallmark also sees its role as making available programs to which the greater American public would not ordinarily have access. Hallmark tries to present dramas or musicals that would not be easily staged by local theater groups or high schools. Or else it presents well known works with exceptional talent (George C. Scott in "Beauty and the Beast" or Richard Burton doing Shakespeare).

As IBM requires assurance that a program will reach a special target group, Hallmark is interested only in family viewing, thereby excluding material that is both new and controversial. But Hallmark also wants to succeed in attracting a large number of people to view their programs. Thus, if they were to do a script by a little known playwright, they would be likely to get a famous star to play the lead role. Or, if they were doing a famous historical play, they might consider a bright, young, talented actor. The most common combination (and the one most likely to attract the largest audience) is a combination of a well known work and a famous star or stars.

From the commercial producers' viewpoint, the range of material that would used is much wider. Mr. Michaels, of "Saturday Night", likes to present variety. He tries to include humor, minimalist painting, experimental film, and experimental video in each show. However, the key ingredient is the way in which all of the components fit together as a television show. The term which Michaels uses to describe this phenomenon is "chemistry." He feels that a television show (and, specifically, his television show) is successful when the best people are brought together and each adds to the show through joint collaboration. The way to extract the maximum from all the people involved, he feels, is to do the show live. It is the edge which being live adds that makes the greatest difference. Because there can be no retakes, everyone is stimulated to give his best. Michaels feels more programs of this type should be used.

Al Burton of Tandem Productions feels that certain basic changes have to occur in the structure of television before a major amount of new arts and cultural material can appear. The major innovation needed to encourage the appearance of new programming envisioned by Mr. Burton is cohesive financing. He feels that the current financial structure is overly decentralized. No one has enough money or authority to bring an idea or line of development to fruition. He suggested that there should be a fund available with a strong director (and a one-year contract) chosen by an elitist, knowledgeable group. The fund should be financed by the Corporation for Public Broadcasting and underwriting corporations. Once such a fund is established, the director could experiment and produce material that could be aired nationally. Burton also feels the need for expanded use of public access channels, and for experimental video art. Public television decision-makers are a diverse group; and among them there is a desire for almost any type of arts and cultural material that can be defined. Performances, programs about the arts, experimental uses of television as art,

workshops to help develop and provide exposure for new talent, high quality programs that draw membership support for local stations: these are all materials that would be used by one or more of the decision-makers we interviewed in the decentralized PTV world. In almost all cases, the main desire is for more money. Michael Rice, of WGBH, expressed interest in doing different types of cultural programming. At the moment, most PTV drama is costume drama and most PTV music is classical. He would like to have a broader spectrum of drama and music, but current sources of funds limit the range of possible programming. Rice's description of the role of public television has several aspects; in each of them, he feels more material is needed. PTV, as a showcase for performances, needs more high-quality material in a wider range of categories to bring more of the arts into more about the arts -- both performing and non-performing. While both performance programming and programming about the arts would be broadcast in order to reach a viewing audience, Mr. Rice also feels that a fraction of the resources allocated to arts and cultural programming should be devoted to the development of new talent. On the one hand, PTV can offer exposure to new performers and production talent; on the other hand, output of PTV workshops need not be broadcast in every case. Programs to develop new talent should not always be expected to produce high-quality material.

At WNET, both George Page and Jeanne Mulcahy discussed the problems involved with the concept of multiple underwriting and matching funds for major projects. When mid-project changes in budgets or concepts are required, it is sometimes difficult to get agreement from all the underwriters. It was also stressed that the principle of non-interference of underwriters in production should be strongly defended.

The general desire in public television is for more of almost everything; more money, more quality, more quantity. (The emphasis of PBS President Larry Grossman was on the need for relatively more public affairs programming and relatively higher budgets for cultural offerings. He believes that high budget production for PTV is more cost effective because it reaches more people per dollar spent.

Don Quayle, of the Corporation for Public Broadcasting, discussed an issue that is related to the materials that would be used if available: the question of rights to already existing programs. It is important, he feels, to anticipate the need for the purchase of expired rights to broadcast high quality programs and to be more aware of future rights issues when contracts are negotiated. The issue of rebroadcast rights becomes important when programs have cultural

value. If they have such value, then they deserve exposure in later years. (Some day there may even be a concept like 'classical' television.) Rebroadcast clearly requires some system of payment to artists for additional use of material. However, the system can become extremely complex when explicit provisions and options are not included in original contracts.

Rebroadcast rights and other rights are important to a consideration of the potential use of cultural material made for television. Both commercial and public broadcasters pay artists for the right to broadcast programs a certain number of times within a period of time. If recorded television programs can have cultural or artistic merit similar to recordings of musical or dramatic performances, limited rights will restrict the distribution of such material via television broadcasts; and limited rights will also restrict future use of such material over closed circuit and cable systems or distribution of such material on videocassettes or videodiscs. At present, we have not found either cable or home-playback systems to be sufficiently widespread for the rights problem to be significant. In the future, it is possible that video recordings may proliferate. That would lead to direct sales in retail stores, rental libraries, and/or television stations and cable channels that specialize in playing video records. It is difficult to know what the future will bring in the way of video technology and systems.

ESTIMATES OF THE AMOUNT OF ARTS AND CULTURAL MATERIAL BROADCAST

Commercial television in the U.S. is the most widely used mass medium. In the winter, roughly two-thirds of all homes in the country are watching commercial TV at any moment in prime time. Even small numbers of cultural programs on the commercial networks reach large numbers of homes. Public television has more cultural material to offer, but it reaches fewer viewers. A low rated network special may have ratings seven or eight times those of a typical PTV program. The quantity of material offered is only one way to look at the nature of the system.

COMMERCIAL TELEVISION

An estimate, based on objective data, of the amount of arts and cultural programming on non-network, commercial television has proven to be beyond the scope of this project. Centralized records of program content for independent commercial stations and for local (non-network) air time on network affiliated stations does not appear to exist. (The F.C.C. collects some programming information from all stations; however, the category scheme applied does not allow for an enumeration of anything approaching an arts and cultural designation.) It has also proven impossible to estimate, without benefit of data, the quantity of arts and cultural reviews and performances that occur within the main body of news and talk shows.

The one aspect of commercial television for which centralized data exist is special programming. James Poteat of the Television Information Office, an organization funded by the commercial networks, the National Association of Broadcasters, and others, generously provided us with lists of specials for the period 1963 through 1972. Examination of the T.I.O. library files allowed us to prepare similar lists for 1973, 1974 and 1975. The data in Table T-2 summarize the number of specials listed each year for each of the three commercial networks. It can be seen that the ABC Network has consistently presented fewest cultural specials, while NBC and CBS show a back-and-forth pattern with one network showing more specials one year and the other showing more specials another year.

Table T-2

Summary of Network Specials: 1963-1975*

	NETWORK			
Year	NBC	CBS	ABC	Total
1963	8	2	1	11
1964	5	2	0	7
1965	6	6	1	13
1966	5	7	1	13
1967	16	8	5	29
1968	7	12	6	25
1969	10	14	0	24
1970	24	14	2	40
1971	20	14	0	34
1972	10	15	1	26
1973	16	15	9	40
1974	16	20	11	47
1975	11	17	9	37

*Data for 1963-1972 compiled by T.I.O. Data for 1973-1975 compiled by the authors for this project.

Using the rather subjective criteria for arts and cultural specials during the last three years, we find 40, 47, and 37 such programs for all three networks combined. This tallies fairly closely with the estimate of Bill Storke, who is in charge of specials for NCB, that each network broadcasts perhaps a bit more than one high quality program per month, on average. Assuming that there are about 40 such programs per year on commercial television, and assuming that the average length is about 90 minutes (the range is from one to three hours), the total comes to an estimated 60 hours per year. If all 60 hours were broadcast in prime time, the percentage of prime time devoted to such programming would be about 1.7 percent of all prime time network programming.

(Each network broadcasts 1144 prime time hours per year. Thus, 3 x 1144 = 3432 prime time hours for all networks; and 60/3432 = .017.) In other words, if you watched a random selection of prime time commercial network television, you would see one hour of these cultural specials for every 57 hours in front of the set.

PUBLIC TELEVISION

The Corporation for Public Broadcasting and the National Center for Education Statistics support a thorough biennial survey of the content of all public television stations around the country. These surveys provide detailed information on the amount of arts and cultural programming provided by the non-commercial stations. The Public Broadcasting Service also compiles data on the number of hours of "original program material" distributed by PBS. However, the PBS figures do not include repeats of programs or programs obtained by local PTV stations from non-PBS sources. Thus, the CPB/NCES data provide a more accurate description of the programs actually broadcast by the PTV stations around the country. (There are over 250 such stations, representing over 150 different schedules.) The tables presented below have been taken from the advance edition of "Interim Report: Preliminary Results of CPB/NCES Public Television Content Survey (January 1 to June 5, 1976)" dated October 1976.

Table T-3

Total Program Hours By Type and Time Period

Category	Prime Time	All Air Time
Music, Dance, Performance	16%	7%
Culture, Art, Reviews	3%	3%
Drama	16%	5%
Feature Film	3%	2%
Comedy/Satire	1%	1%
Science	6%	2%
News/Public Affairs	24%	13%
History, Biography	10%	4%
General Information	13%	8%
Skills, How-To-Do-It	2%	5%
Station Promotion/Auction	1%	1%
All Other General	0%	0%
Instructional	2%	22%
Children's	1%	25%

The table shows that 38% of prime time public television is used to broadcast culture/art/reviews, music and dance performances, drama, and feature films (almost exclusively from the Janus Films package of foreign movies). These categories appear to give a good approximation of what is meant by arts and cultural programming, although there may have been programs in the instructional and public affairs (and, perhaps, history/biography) categories that would also be included under some definitions of the term. Where a viewer of commercial network television might find culture and the arts in one of every 57 hours of prime time, a viewer of public television can find such material in one of every 2.6 hours. Since public television devotes a considerable proportion of its total air time (47 percent) to instructional and children's programming, the percentage of arts and cultural offerings over the total schedule is lower than the prime time proportion (17 percent vs. 38 percent). However, even the overall percentage is ten times our estimate of the percentage of network prime time arts and cultural programming. Subjective experience, confirmed by examination of TV Guide, indicates that non-network commercial programming is almost totally devoid of any arts or cultural material.

Table T-4

Locally Produced Hours by Subject Matter

Culture, Art, Music, Dance, Drama, Reviews Feature Film	7%
Instructional	35%
News/Public Affairs	27%
General Information	14%
Skills, How-To-Do-It	5%
Children's	2%
Sports	2%
Fund Raising	6%
All Other	2%

The published "Interim Report" on the content of public TV stations for the first portion of 1976 also indicates the kinds of programs that are being produced for local use by PTV stations. As Table T-4 shows, the bulk of local PTV program production is in two areas: instructional material and news/public affairs programming. However, 7 percent of air time derived from local production is in the arts and cultural area. According to the survey, 22 percent of the broadcast time derived from PBS distribution was material in the four categories (culture/art/reviews, music or dance performance, drama, feature film). According to PBS figures,

34 percent of original broadcast hours in fiscal 1976 were cultural as opposed to educative and children's or public affairs. (Differences between the PBS figures and the CPB/NCES figures are due to the use of different category schemes and the fact that broadcast hours at the stations is not the same variable as original broadcast hours distributed by PBS. "Sesame Street" may be shown three times a day: it would count as three broadcast hours but just a single original hour of PBS distribution.)

The CPB/NCES survey of PTV program content probably provides a sufficient data base from which any information about PTV program content can be derived. Published data subdivide PTV programming by content category, and subdivide these content types by other variables. Region of the country, produced, source of distribution and other variables are either presented or stored in the data file and available for analysis. For programs distributed by PBS, the data file includes program titles, allowing for analyses of specific series or groups of series that fit an arts and cultural coding scheme for research. Of course, such analyses could only be undertaken with the cooperation of the Corporation for Public Broadcasting; and there would be minor costs that would have to be covered. Even so, the data already being collected are probably sufficient for any quantitative analysis of arts and cultural programming on public television stations in the country.

KEY DECISION-MAKING POSITIONS

Radio programming in the United States is based almost entirely on the formats of each local station. The exceptions, such as network news and sports coverage and consultants who determine programming for groups of stations, have little effect on commercial radio stations which broadcast arts and cultural material. Public radio presents a more complex system of interaction; even there, the main characteristic of the system is station autonomy. There are only two national network radio drama series: public radio's "Earplay" and the CBS networks' "Mystery Theater", which is carried by 217 stations.* We have been able to discover no other network distribution of arts and cultural material. This does not mean, however, that certain types of cultural material are not available across the country. Such material is no longer the product of national radio networks. National Public Radio currently provides tape distribution of some arts and cultural material to non-commercial stations. Both commercial and non-commercial stations also receive such material from independent syndicators who package concert series and radio plays and sell the audiotapes to stations. Thus, the key decision-makers in arts and cultural radio tend to be local station management, syndicators, and the officials of public radio -- through National Public Radio, The Corporation for Public Broadcasting, and the Association of Public Radio Stations.

Radio station personnel, whether public or commercial, are generally divided into two groups -- management and announcers. Station managers and program managers make decisions, under authority of station owners, about the format of a station: whether there will be classical music, talk, or rock and roll; how much news programming will be aired, etc., announcers tell the audience about the music being played, interview guests, and usually select the individual pieces of music that are broadcast.

*Since this was written, CBS began a second drama series, "General Mills Adventure Theater."

The decision-making positions that affect arts and cultural radio programming lie at the top levels of the radio stations' organizational charts. The overall format of the station will be determined by the station's owner. If a station is licensed to a non-profit organization for non-commercial use, it may have an education, informational, or fine arts format as part of its reason for existence. If a commercial station is owned by a prestigious newspaper, it may have its own reasons for presenting arts and cultural material. Thus, WQXR is owned by The New York Times and provides a profit-making classical music format that is associated with the paper. If a station is owned by a media-group that owns other radio stations, there is more attention to the profit motive and less need for the station to reflect prestige upon its owner. Thus, KKHI, in San Francisco, is the only station among those belonging to its corporate owner which has a classical format; but it is profitable, and the owner is happy. (KKHI has not always been a classical music station. It has had popular music formats under other owners.) WFMT in Chicago is a commercial, profitable FM "fine arts" station that is owned by the non-profit corporation that runs a public television station and Chicago magazine. This undoubtedly influences its freedom of action and allows innovative programming as long as there is profit.

An individual owner's taste may determine the station's format. Thus, a jazz afficiando in the San Francisco area has owned KJAZ for many years. The station is respected and is known as one of the prestige jazz stations in the country. Even though the station suffers severe financial problems, the owner will not consider changing the station's format to one that might be more profitable, nor will he consider selling the station to someone who would change the format.

Recently there have been several cases of both individuals and corporations purchasing stations with the intent of changing formats to those which are believed to be more profitable. (In at least one case, the proposed change was from classical format to a rock music format.) Law suits have been brought by listeners and organized groups seeking to prevent the format change. The Federal Communications Commission recently ruled that it should not be involved in regulating program formats, saying that determination should be left to the discretion of the licensee. However, this is contrary to recent appeals court decisions, and the issue is likely to be ultimately decided by the Supreme Court.

Although station owners determine the broad outlines of station formats, station management fills in the outlines. A "fine arts" station may have classical music, folk music, drama, literature, cultural programs or interviews. A classical music format may contain a given number of news breaks or may have policies about the length and types of classical pieces played at a given time of day. A jazz format leaves a wide variety of musical alternatives -- from blues to very contemporary music. A format with an emphasis on non-musical programming can have CBS "Mystery Theater", transcriptions of radio programs from the 1940s, or comedy albums. The chief executive of a local radio station is usually called a general manager; there is also usually a program manager. These two people generally determine the formats of different programs -- or different time periods. If a new program of an artistic or cultural nature is introduced, it is generally the station manager, the program manager, or both, who instigate the change.

At one commercial FM station specializing in classical music and cultural discussion, decisions about program formats are made by committee. Anyone can suggest a new program and present it to the committee; but it is usually the general manager who does so. The committee consists of the general manager, the program director, the assistant program director, and the people in charge of sales (of commercial time) and business affairs, although the latter two are not always present. The committee meets monthly, and more frequently if necessary, to consider new programs and possible termination of current programs.

At a modern "free form" FM station, program decisions are made by choosing announcers who like to play the type of music that management feels should be broadcast in a certain time period. This, in fact, is a common technique by which station management determines format at stations which broadcast certain types of "arts and cultural" material. Since announcers are usually responsible for selecting the particular pieces of music to be played or particular guests to interview, choosing an announcer with an interest in baroque music is equivalent to programming a time slot with such music. If management feels that the morning jazz program should be up-beat and contain light patter from the announcer while the afternoon program should be more "cool," then announcers with such preferences can be hired for the appropriate time periods. In this way, there is no need for management to tell the announcers exactly what to play and what type of format their programs should have. Thus, at local stations, moment-to-moment and day-to-day decisions about program content are often in the hands of the announcers, while station management --by selection of programming modes for programs or time periods -- fills in the

general details of programming within the broad outline set by the owner of the station's license. ("Playlists" that tell announcers what records to use are common for some radio formats, but not among arts and cultural stations.)

At corporations which sponsor radio broadcasts in the area of arts and culture, decisions are made at the very top. Chevron, for example, sponsored the Standard Hour (concerts) on commercial radio from 1928 to 1955 and the accompanying Standard School Broadcasts. Each year the radio division responsible for these programs submitted a budget to the public relations department which, in turn, submitted it to the Board of Directors for consideration. It is the Board of the company which finally approves the budget for cultural radio programs. This was about $250,000 for Chevron in 1975.

In classical music, there is another group of key decision-makers...the syndicators of concert series. The following concert series are among those available via syndicated tape:

Boston Symphony
Boston Pops
Utah Symphony
Music from Marlboro
Israel Philharmonic
Metropolitan Opera
Music from Eastman
Exxon - NY Philharmonic
Philadelphia Orchestra
BBC Concert Hall
Music from Belgium
Dutch Concert Hall
Cleveland Orchestra
Cleveland Pops
Syracuse Symphony
Chicago Symphony
Mormon Tabernacle Choir

Syndicators must decide whether they can package concert series for a profit after paying the musicians for broadcast rights; and they set the rates that stations must pay.

One key aspect of syndicated concert series is sponsorship. In many cases a national sponsor will have purchased an amount of advertising time within the syndicated program. This money goes to the syndicator, who can then reduce the price to the stations. Of course, the stations then lose the commercial time they might have sold to local advertisers. Many syndicated concert series are purchased by public radio stations. In such cases, there are no advertising minutes in the programs; sponsoring companies (Exxon, Texaco and others) become underwriters. They receive a simple credit for having made the broadcast possible. There is speculation that when National Public Radio obtains its satellite interconnection system (making possible high

quality stereo sound), there will be national underwriting of one or more concert series for an interconnected network of public radio stations that might use live of simultaneous material.

Drama is another key area of syndication. A number of radio drama series are available, including reruns of programs that were first broadcast decades ago, and special dramatic programs (e.g., Halloween horror stories). Such projects are offered in the trade press by independent syndicators; some are profitable.

Original half-hour tapes of "The Shadow", for example, are being played in 300 markets, while "The Lone Ranger", "Fibber McGee and Molly", "The Green Hornet", and "Gangbusters" appear in approximately 200 markets. New half-hour tapes of melodramas such as "Dick Tracy", "Brenda Starr", "Terry and the Pirates", "Counterspy", and "Crime Doctor" are in production.

In a related area of programming, the CBS Radio Network has offered "Mystery Theater" to affiliated stations. Recently, other CBS Radio Network activities have been limited to supplying a news service and some live specials to network affiliates -- quite a change from the high water mark of network radio when there was a full schedule of programming for all affiliated stations. Of the 217 stations carrying the daily dramatic hour, only about 40 are not affiliated with the CBS network. The "Mystery Theater" produces 187 new dramatic shows per year; it has included modern adaptations of Shakespeare plots and plans a full week of O'Henry material. "Mystery Theater" has been a commercial success; thus, it remains on the air and has led CBS to consider the possibility of another dramatic series. Decisions in these matters are made at the network level in New York and Los Angeles. (We have not discovered any activities of the ABC or NBC radio networks -- other than news coverage of cultural events as part of regular news broadcasts -- that would be called arts or cultural programming.)

Another important area of decision-making regarding arts and cultural radio programming is the variety of national public broadcasting organizations located in Washington (NPR, CPB, CPRS). National Public Radio offers member stations a daily public affairs program ("All Things Considered") which sometimes discusses events in the area of arts and culture; it distributes classical music to member stations; and, most important here, it distributes "Voices In The Wind", an hour-long weekly program about the arts. NPR has an interconnection system among member stations. "Voices" and "All Things" are distributed simultaneously to a network of

member stations. The technical quality of the interconnection is not sufficient for transmission of quality stereo music; so NPR distributes performance material via tape or discs. In the future, NPR plans to have a satellite interconnection that can provide projects such as the broadcast of the La Scala performing at Kennedy Center must be distributed by tape.

About 850 non-commercial radio stations now operate in the U.S. About 175 of them are qualified to receive community service grants from the Corporation for Public Broadcasting and become members of NPR. (To qualify, a station must be on the air for a certain amount of time and have a minimum number of staff employees.) CPB grants help support local operations. CPB money also supports NPR operations. A survey in the winter of 1973-74 indicated that, among CPB qualified stations, 15 percent of the programming came from NPR. Roughly a third of this was interconnected air time, while the rest was by tape or disc distribution. (NB. Under certain circumstances, stations that are not qualified for CPB grants can use material from NPR.)

Another significant public radio project is the weekly hour-long drama series "Earplay." Original radio dramas in this series have been produced for several years by Minnesota Public Radio with funds provided by CPB and the National Endowment for the Arts. "Earplay" is not an NPR project. Distribution is by disc recordings, made in stereo to add a spatial dimension to the material.

Finally, there is one aspect of the structure of radio broadcasting that is not precisely part of the decision-making structure but is quite important for understanding arts and culture in broadcasting. Two organizations, ASCAP and BMI, control the rights to most recorded music in the U.S. (A third organization, SESAC, has rights to some classical performances.) Any radio station wishing to play recorded music must pay license fees to these organizations for broadcast rights. These fees -- which amount to less than 5 percent of a station's gross income -- are distributed by ASCAP and BMI to the composers and musicians. Stations buy licenses from these organizations and are entitled to play any quantity of material under the control of the organizations. Payment is a percentage of station income, and not based on the particular music played. ASCAP, BMI and SESAC can license almost everything a station might want to play. However, there is one major exception. Long vocal works, especially operas, are covered by copyrights that are usually not included under existing licensing agreements. As a result, there tends to be added expense and effort involved in broadcasting certain operatic works.

A related issue that is currently unresolved is the question of license fees for non-commercial stations. Since the income base from which fees would be computed is quite unlike the gross income of commercial stations, non-commercial stations tend to pay less for rights to broadcast certain syndicated material. At the moment, they do not pay fees to ASCAP and BMI, yet they play recorded music. In some markets, commercial classical music stations have begun to argue that non-commercial stations have an unfair advantage. A new copyright law now makes public broadcasters liable for license fees. Details are currently being negotiated.

In sum, decision-making in arts and cultural areas of the radio industry is in the hands of a number of different kinds of people. Station owners (and public radio license holders) make broad and basic decisions about the nature of their stations. Station management -- station managers and program managers -- guide the course of their stations. On air announcers determine the specifics. There are, of course, other influences: sales departments provide feedback on what advertisers want and engineering staffs can explain or overcome technical limitations on certain types of programming (e.g., nationally interconnected stereo for public radio). At another level, syndicators determine which classical performance series will be available. These decisions are made in conjunction with advertisers or underwriters, who ultimately may have the final say since the lack of advertising revenue would put an end to many of the syndicated series. Similarly, the last vestiges (or are they a rebirth?) of radio drama have been decided upon by CBS (and public radio) at the national level; these projects would not exist without money committed in advance for their production. This was true of "CBS Mystery Theater" and it is clearly true of the new "General Mills Adventure Theater" which even has the sponsor's name in the title. Through our discussion, we have kept the emphasis on roles and functions of decision-makers; but it should be remembered that personalities can also influence decisions. The desire and drive of a small number of people -- notably producer Himan Brown -- have led to the creation of the CBS drama series. Similarly, a strong program manager can sometimes have more influence over station programming than the station owner; or a particular owner can have more influence than another owner. In radio, as elsehwere, decision-making is not a phenomenon that is easily described by a single, static model.

"ARTS AND CULTURE" AND RADIO TERMINOLOGY

"Arts and cultural programming" is not a phrase that is used in the radio industry. Different individuals take it to mean different things. There is a general area of agreement: "arts and culture" includes the traditional classical performing arts (opera, symphony, chamber music, classical drama, poetry) for almost everyone. In addition, reviews and discussions of such performances or other recognized art forms (literature, painting, sculpture, dance, cinema) are commonly assumed to be part of arts and cultural programming. From that point, however, there is no clear consensus; the terminology is often common to people with with very different concepts. For example, there is general agreement that "high quality" music is arts and cultural material; however, the meaning of "high quality" varies from person to person. Some feel that certain pieces by rock musicians are of high quality; other individuals would not consider any rock music as arts and cultural programming.

Also, the phrase can be applied to program formats as well as program content. Thus, a station which covers a live concert by popular musicians may consider such coverage to be arts and cultural programming, but playing a record of the same music by the same artists (even if recorded live) might not be. The distinction here seems to be that the use of the medium of radio can be an art in itself, so live coverage fits the definition. Similarly, a highly produced documentary special on a popular entertainer might be considered arts and cultural programming. Station executives may or may not feel that Stevie Wonder records belong in an arts classification; but independent of that judgment, they may feel that their documentary on the life of Stevie Wonder is cultural programming.

A second problem with the phrase "arts and cultural" is that it includes two words that imply different concepts to different individuals. The notion of "culture" brings forth a wide range of concepts ranging from "high culture" phenomena generally associated with cultured life styles to popular culture materials including soap operas, nostalgia, and "Top 40" music. Similarly, there is a range of meaning associated with "art" and "the arts" when the word is applied to radio programming. The industry uses the term "artist" to include almost all performers. By extension, all of their work would be considered art. Thus, Dolly Parton (a country music singer) is an artist. Is her music art? In general, people in the industry seem unwilling to get involved in such questions. The issue of whether or not something is art may be of interest to some as a matter of speculation;

but within the broadcast industry, it is not a meaningful distinction. The important questions are on the order of "Is this the kind of material we want for our station?" and "Is this material good enough for us to put on the air?"

If we beg the question and assume that arts and cultural programming can be identified, it will fall into two categories that make sense to people in the radio industry: performance material and material that discusses, interprets or otherwise talks about art and culture. This distinction offers clues as to where one should look in a survey of radio content. On the one hand, a certain type of material would be called arts and culture performances (mainly music and drama). On the other hand, a survey would have to discover the amount of discussion of "art and culture" in terms of either air time or programs within which such material appears (e.g., news programs).

There are a number of programming category schemes. Most are similar to one another. The following table makes use of a category scheme used by Broadcasting Yearbook:

Table R-1 Radio Station Formats

[Categories in CAPS are those used to classify formats; numbers in parentheses ( ) indicate estimated number of stations with this format; categories in lower case letters are other terms sometimes applied to the main category.]

AGRICULTURE & FARM (54)

BEAUTIFUL MUSIC (434)
- good music
- instrumental music

BIG BAND (4)

BLACK (248)
- rhythm & blues
- soul

CLASSICAL (191)
- concert
- fine music
- semi-classical
- serious music

COUNTRY & WESTERN (1,734)
- bluegrass
- country
- countrypolitan
- contemporary country
- modern country

ETHNIC/FOREIGN LANGUAGE (35)
- (excluding SPANISH)

RELIGIOUS (362)
- Christian
- gospel
- inspirational
- sacred

SPANISH (98)

TALK (277)
- discussion
- informational
- interview
- personality

GOLDEN OLDIES (184)
- nostalgia
- old gold
- solid gold
- solid gold rock
- classic gold

JAZZ (84)

MIDDLE-OF-THE-ROAD (2,483)
- adult
- adult contemporary
- bright
- conservative
- entertainment
- easy listening
- good listening
- standards
- up-tempo

ALL NEWS (73)

POLKA (7)

PROGRESSIVE (404)
- alternative
- folk
- free form
- hard rock
- progressive rock
- underground

TOP 40 (1,503)
- contemporary
- hit parade
- popular
- request
- rock

The market research reports presented by a survey organization called "Target Group Index" make use of the categorization scheme that is presented in Table R-2.

Table R-2 TGI Radio Classification Scheme

CLASSICAL & SEMI-CLASSICAL	MODERN COUNTRY MUSIC
HEAVY ROCK	TALK
TOP 40	NEWS
GOLDEN OLDIES	BLACK
POPULAR MUSIC	SPORTS
STANDARDS	FARM
MOSTLY INSTRUMENTAL	

The basic approach to categorizing radio content, as shown in Tables R-1 and R-2, is by station format. Unfortunately, only two of the categories used by the Broadcasting Yearbook, classical and jazz, describe formats that clearly belong in an "arts and cultural" grouping. Folk music, a likely, but not certain, candidate for inclusion as "arts and culture," is put with hard rock and underground music in the "progressive" category. Regular discussions and reviews of matters of cultural importance are totally lost in such schemes; they may occur on all-news stations or talk stations, or they may be included in scheduled news/public affairs programming on any type of station.

The one area about which there is almost complete agreement is classical music. The industry considers stations with such formats to clearly offer "arts and cultural" programming. Table R-1 gives some of the terms applied to classical formats: concert, fine arts, semi-classical, and serious music. Note that "good music" is in the category called "beautiful music," which is perhaps typified by Montavani and his violins. Interviews at classical music stations produced category schemes that are similar. At one station, a manager listed "classical," "cultural community," "fine arts," and "talk: criticism" plus "talk: commentary." Another station manager listed music, poetry, drama, literature, cultural discussion, and criticism as the content of his "fine arts" station which would be considered to fall in the area of arts and culture. The trade association of stations that broadcast classical music is known as the "Concert Music Broadcasters Association," thus putting a bit of emphasis on the phrase "concert music."

SOURCES OF SUPPORT FOR ARTS AND CULTURAL PROGRAMMING

COMMERCIAL RADIO

The basic way in which commercial radio supports all types of programming is by selling time for commercials. The three major types of advertising time sold are network, national spot, and local spot. Network sales are made around network programs. The stations carrying a network program receive it free of charge and split the commercial minutes contained within the program with the network. On "CBS Radio Mystery Theater", for example, CBS radio sells five commercial minutes during the program to national advertisers such as Buick or Budweiser; the local stations selling the remaining three commercial minutes. Network sales account for 5 percent or less of all commercial radio revenues. This year (1976) is the first profitable year since 1972 for network radio.

National spot sales consist of local stations selling commercial time to national clients. For example, an ad agency representing a national client such as Pepsi-Cola will buy local spots around the country for an ad campaign or for a particular commercial. Or the representative of a group of stations may be able to sell time on many stations to a national buyer. National spot sales currently represent about 20 percent of radio revenues in 1975.

Finally, there are local spot sales. This type of activity consists of local stations selling time to local advertisers. Local sales are the single largest source of radio income, comprising 75 percent of all radio revenues in 1975.

Each radio station has an exact number of commercial minutes that it can sell. The minutes available are referred to as the "inventory"; a station sells spots from inventory until it is depleted. The rates that a station charges are roughly based on the number of listeners tuned to the station during an average quarter hour, and on their demographics. The more listeners, the more expensive the spot ad. Certain advertisers want to reach certain audiences. In those cases, it is the number of listeners with desired demographic characteristics that determines the price of the spot.

The radio industry is a big business. In 1974 (the most recent year for which there are published figures), AM radio reported net revenues of $1.35 billion, while FM reported $248 million. Total revenue for 1974 was $1.6 billion. According to estimates made by the Cox Broadcasting Corporation, revenues for 1975 were $1.4 billion for AM and $310 million for FM, totalling $1.7 billion.

By 1981, Cox estimates that AM will produce $1.7 billion, while FM will receive $938 million. Radio revenues have been rising very rapidly. Last year, they rose 10.2 percent, which was twice as much as the advertising industry as a whole. (Reported by Advertising Age.) FM radio is seen by Cox as growing much more rapidly than AM. Cox estimates that FM will have grown from a 39 percent share of the radio audience in the top 40 markets in 1975 to a 56-60 percent share by 1981. Audience growth is related to the growing number of portable, stereo and automobile FM receivers; larger FM audiences produce higher FM revenues.

The top 40 markets contain a proportionately greater share of the revenues than might be expected. While the top 40 markets contain only 15 percent of all radio stations, in 1974 they accounted for 44 percent of all radio revenues and 68 percent of pre-tax income.

Within the top 40 markets, classical format stations play a minor role. Among 13 format types described by Television/ Radio Age, classical stations are fourth from the last when ranked by frequency of appearance, next to last when ranked by share of audience per market, and also next to last when ranked by share per station.

When seen within this framework, the plight of commercial classical FM stations is clear. The 86 commercial FM classical stations* within the top 100 markets are estimated to have revenues of only $20-25 million for 1975, and to have expenses of approximately $30 million, or a net loss between $5 and $10 million. Of the $30 million in operating costs, it is estimated that approximately 45 percent are programming-related. Programming-related costs include music rights and licensing fees, production and announcers.

While the current aggregate financial picture for classical FM stations in the top 100 markets is negative (money-losing), a few selected stations in the largest markets are profitable. Raymond Nordstrand, General Manager of WFMT and Chairman of the Executive Committee of the Concert Music Broadcasters Association, reported in Advertising Age that several big-city classical music stations increased their sales by 40 percent to 50 percent in 1975. For 1976, some of these stations are expecting gains that may be almost as great. (All three commercial classical music stations interviewed for this report -- WFMT, WQXR, and KKHI -- were in the top 10 markets and were profitable.)

* This figure was provided by the Concert Music Broadcasters Association. It is not in exact correspondence with Table R-8 due to inclusion of all markets and division by primary and "special programming" format types in the table.

One source of financial support for arts and cultural programming is called the barter arrangement. A station receives material free or at reduced cost in return for airing commercials already inserted in the program. (The station gets no compensation other than the programming for carrying the commercials.) In the case of non-commercial stations, a parallel arrangement provides free programming to stations in return for underwriting credits. ("The following program is brought to you thanks to a grant from ...") At the network level, we have already discussed the distribution of the CBS "Mystery Theater" with national spots inserted in the program. In the area of syndication, an example might be the situation in which Exxon Corporation provides tapes of the New York Philharmonic.

A major non-financial source of support for arts and cultural programming is the prestige associated with owning and operating a certain type of station. For example, Walter Neiman of WQXR, which is owned by The New York Times, thinks that the station could probably make more money by changing its classical music format to one of the more popular formats. However, he feels that The Times is satisfied by the amount of profit brought in by the station and places a large value on the goodwill gained among influential community members because the newspaper is known to support the classical radio station. In San Francisco, KJAZ is owned by an individual dedicated to jazz. He is willing to operate in a difficult financial situation in order to keep a jazz station on the air.

Another kind of support has been organized resistance to format changes. In Chicago and Milwaukee, attempts to change formats from classical music to more popular (and potentially profitable) formats have met with strong protests and legal action from listener representatives and public interest groups. Eventually, these issues were heard by the F.C.C., which ruled that format changes are not under its authority. However, decisions in lower courts have supported the position that format changes cannot be undertaken so simply; the issue is likely to be resolved by the Supreme Court.

One of the problems that led to the non-profitability of classical stations was a lack of successful salesmanship. Raymond Nordstrand recently compiled evidence to indicate that listeners of classical stations tend to be the most likely users of over half of the consumer products surveyed by a market group. Information like this is being used increasingly to sell the inventory (available time for commercials) of commercial classical stations. With the

growth of FM, as predicted by Cox, and increased marketing efforts by classical music broadcasters, the profitability of classical stations should improve. The trend is towards selling the demographic characteristics of classical station listeners rather than the absolute number of listeners.

PUBLIC RADIO

Public radio stations constitute about 10 percent of all radio stations, but they are disproportionately important in arts and cultural programming. Public radio is divided into two primary types: CPB-qualified stations, and all others. The Corporation for Public Broadcasting has set the following criteria -- stations which meet them are qualified for grants from CPB and program material from National Public Radio:

1. Non-commercial license
2. More than a minimum effective radiated power
3. At least one control room adequately equipped for the production of local programs
4. A minimum full-time professional staff
5. At least four hours on the air, 365 days a year

Of the approximately 846 non-commercial stations in the U.S. in Fiscal Year 1974, 155 of them were CPB-qualified. Sources of financial support for CPB-qualified public radio stations are shown in the following table. (Source: CPB-Qualified Public Radio Stations Fiscal Year 1974.)

TABLE R-3

Total income of CPB-qualified public radio stations, by fiscal year and source of income: Aggregate United States, fiscal years 1970-1974

Source of income (Number of stations)...	Total income, by fiscal year ($ in thousands)										% Change 1973-1974 (+7.6)
	FY 1970		FY 1971		FY 1972		FY 1973		FY 1974		
	Amount (91)	Percent	Amount (103)	Percent	Amount (121)	Percent	Amount (144)	Percent	Amount (155)	Percent	
All sources	$9,377	100.0	$12,127	100.0	$15,421	100.0	$18,802	100.0	$21,649	100.0	+15.1
Federal Government	316	3.4	663	5.5	917	5.9	1,734	9.2	1,156	5.3	-33.3
HEW Facilities Grant			543		753		1,479		933		
All others			120		164		255		223		
Public Broadcasting Agencies	506	5.4	991	8.2	1,600	10.4	2,329	12.4	2,750	12.7	+18.1
Corporation for Public Broadcasting			977		1,574		2,313		2,711		
All others			14		26		16		40		
Institutions of Higher Education	5,311	56.6	5,339	44.0	7,368	47.8	7,538	40.1	9,237	42.7	+22.5
State colleges and universities	4,551		4,317		6,464		6,415		7,938		
Other colleges and universities	761		1,022		904		1,123		1,299		
Local Boards of Education	193	2.1	505	4.2	1,155	7.5	1,489	7.9	1,791	8.3	+20.3
Other Local Government Sources	854	9.1	959	7.9	1,130	7.3	1,187	6.3	1,294	6.0	+ 9.0
State Board of Education	406	4.3	820	6.8	924	6.0	966	5.1	1,071	5.0	+10.9
Other State Government Sources	318	3.4	1,300	10.7	439	2.9	1,166	6.2	1,320	6.1	+13.2
Foundations	200	2.1	160	1.3	221	1.4	440	2.4	177	0.8	-59.8
National foundations	139		6		39		27		9		
Other foundations	61		154		192		413		167		
Business and Industry	25	0.3	26	0.2	26	0.2	242	1.3	244	1.1	+ 0.8
Subscribers and Individuals	899	9.6	973	8.0	1,110	7.2	1,285	6.8	1,912	8.8	+48.8
All Other Sources	350	3.7	392	3.2	531	3.4	426	2.3	697	3.2	+63.6

Because they hold the overwhelming majority of public radio licenses, institutions of higher education are the dominant source of funds for CPB-qualified public radio stations, contributing 42.7 percent of all funds. Public broadcasting agencies, notably the Corporation for Public Broadcasting, were the second largest contributors, supplying 12.7 percent of all funds. State and local government combined to contribute 12.1 percent, while boards of education, state and local, contributed 5.0 percent and 8.3 percent respectively. The federal government directly supplied 5.3 percent of the total. Foundations, business and industry together contributed a little under 2 percent, while subscribers and individuals contributed 8.8 percent.

There is a strong relationship between the amount of money contributed by any one type of organization and the number of CPB-qualified stations which are licensed to such organizations. (See Table R-7.) While institutions of higher education supply 42.7 percent of all funds, 67 percent of CPB-qualified stations are licensed to colleges and universities. Similarly, local public school system licensees constitute 10 percent of CPB-qualified stations and local boards of education contribute just over 8 percent of all funds.

Table R-4

CPB-Qualified Public Radio Stations
By Fiscal Year

Type of License	1970	1971	1972	1973	1974
All types	91	103	121	144	155
Institutions of higher education	67	74	84	96	104
Local Public school systems	4	8	11	14	15
State/municipal authorities	10	10	10	10	10
Community organizations	10	11	16	24	26

A number of sources provide arts and cultural program material for public stations. Local stations devote most of their air-time to programs in which station announcers play recorded music. Public stations have been operating at an advantage over commercial stations since they pay no ASCAP or BMI licensing fees (although there is talk of a change in the copyright laws that would alter this situation). Public stations also purchase programs for airing (usually at prices reduced from commercial rates) or they receive concert series in a barter arrangement in return for underwriting credits for the sponsor. In addition, CPB supports National Public Radio (NPR) which produces and distributes a large amount of arts and cultural programming ("Earplay" and "Voices in the Wind", for example). All CPB-qualified stations receive this material free of charge over interconnection lines from AT&T. In addition, some non-CPB-qualified stations have also received some free NPR material.

In the future, satellite interconnection of public radio stations will make possible simultaneous stereo broadcasts -- perhaps of live performances. With the current leased line set-up, stereo interconnections are prohibitively expensive. Thus, high quality music has to be sent by tape or discs through the mail. In addition to satellite interconnection, NPR's role in the production and distribution of arts and cultural material is likely to increase as the federal appropriations for public broadcasting increase. FY 1974 saw an 18 percent increase in CPB funds to the CPB-qualified stations. As the Congressional allocations to CPB increase under the new five-year funding bill, CPB contributions to local qualified public radio stations will also continue to increase. Thus, by supporting the cost of the satellite, NPR activities, and grants to local stations, Congressional appropriations for public broadcasting are a significant source of financial support for arts and cultural radio.

DETERMINING AUDIENCES FOR ARTS AND CULTURAL RADIO

Several techniques are used to determine the size and nature of radio audiences; a variety of research firms work in the field. Techniques used include door-to-door surveys, telephone surveys, mail surveys, and diary placement. Among the companies involved are Statistical Research, Inc., which conducts R.A.D.A.R. telephone surveys of national audiences; the Pulse organization; and American Research Bureau, which provides the Arbitron services. All of these services and several others are important sources of audience information. However, commercial radio stations that present arts and cultural types of programming tend to take one of three main approaches to determining the nature of their audiences:

1. They use the Arbitron or Pulse service for their market.

2. They refer to special studies of their audiences.

3. They avoid systematic research and rely on common sense assumptions about the kinds of people who listen to certain types of programming.

THE ARBITRON SERVICE

Arbitron conducts regular audience surveys in 163 different markets. The most important of these surveys takes place in the October/November and April/May "sweep" rating periods. Commercial radio stations, including some of the more successful classical and jazz format stations, use the ratings data from these surveys to help determine the prices advertisers pay for commercials. This, in turn, has a significant effect on the income and profitability of a station.

Survey Method. Within each market, Arbitron uses the services of another firm which provides a computer tape listing of all homes in local telephone directories. The computer then selects a random sample of homes from this list. (Other radio survey techniques make use of random digit dialing -- RDD -- to avoid missing homes with non-published numbers.) Preplacement letters are sent to sample homes -- these explain that Arbitron wishes to place a diary in the home. Then a placement telephone call is made to each selected home. From this call, it is determined whether

the household will accept the survey and how many people there are over 12 years old in the home. Next, diaries are sent for each household member over twelve. There is also a mid-survey follow-up call or letter to help insure that diaries are being kept and will be returned. In addition, Arbitron gives an incentive of 25 or 50 cents per diary to sample households. All this results in a consent rate of 85 percent among the designated households, and a return rate of 65 percent of the diaries that have been sent. Thus, the overall response rate is 52 percent among the designated sample of people.

Diaries. Each diary collects radio listening information for a single individual over a seven-day period. The period is the same for all household members, and it always begins on a Thursday and ends on the following Wednesday. A simple 6 x 8 inch diary page records each day of the survey week. Respondents are asked to indicate all radio listening, giving:

1. Time of listening -- from when to when, for each station.

2. A check mark for FM stations.

3. Station indication by call letters or dial setting.

4. Listening done at home or away from home (including in a car).

The diaries are self-mailing. Respondents seal a flap and drop them in a mail box.

Coding and Data Processing. All diaries are returned directly by mail to the Arbitron research facility in Beltsville, Maryland. Trained coders edit the material and enter it into the computer. Among the most important editing procedures is station identification if respondents do not give call letters. If dial setting has been given, the process is simple; but sometimes respondents give the name of a radio personality or the format of a program ("the ball game," "all news," "soul music"). To allow for coding of such responses, Arbitron attempts to maintain sufficient information about stations and formats. Another important procedure takes place within the computer. Since the survey is not a perfect random sample of the population, weights are assigned to each diary in an attempt to make the actual sample represent the population both in geographical distribution and distribution among people by age and sex.

Information Reported. The number of diaries used to provide radio ratings from Arbitron varies with the size of the market. In each of the 30 largest metropolitan areas, more than 1,500 diaries are collected for each "sweep" period; more than 700 diaries are used in markets 31-75; and at least 550 diaries are collected in smaller markets. A great deal of data are reported in the Arbitron Radio Reports published for each market; but only several types of data are commonly used in discussion radio audiences:

1. Average quarter-hour estimates of the number of persons listening to each radio station in the market. These averages are also presented as ratings (percentages of the total population) and shares (percentages of all people listening to radio at a given time).

2. Cumulative estimates ("cumes") of the number of persons listening at least once to a given station in a week. Cumes are presented as a total number of listeners and as a cume rating -- a percentage of the total population.

These basic audience estimates -- average quarter-hour audience and cume audience -- are presented over two dimensions:

1. Time periods are presented, both hour-by-hour and in groups of hours called day-parts. Average and cume audiences are estimated within these time periods.

2. Demographic divisions chart listeners by age and sex.

Thus, it is possible to determine the average quarter-hour listening between 3:00 pm and 4:00 pm among 18 to 34-year-old women -- both as an estimated number of such listeners and as a percentage of all 18-34 women in the market. It is also possible to determine a station's total cumulative audience (both as a number and a percentage) among teenagers in the day-part between 7:00 pm and midnight, Monday through Friday.

Care should be taken in the discussion of the audience for arts and cultural radio programming. The average audience concept indicates the number of people reached in an average quarter hour over a defined period of time, while the cumulative audience concept indicates the number of people reached by at least some part of a station's offerings over a defined period of time. (The broadest cumulative measure

is the sign-on/sign-off cume for a whole week -- the number of people who listened to a station at any time during the period they kept Arbitron diaries.) A given transcription of a symphony performance will reach a certain average quarter hour audience and a somewhat larger cumulative audience over the full length of the concert; but the classical music station will reach a much larger number of listeners during the course of an entire week. With the exception of radio drama, it seems that cumulative audiences are of most interest in determining audiences for arts and cultural radio for two reasons. First, since overall station format tends to be consistent, a sign-on/sign-off cume indicates the number of people reached at all by a certain type of programming. (In television, the audience for a particular program is often of greater interest.) Second, since the average quarter hour audience for stations carrying arts and cultural programming tends to be very small -- especially for non-commercial stations -- a cumulative audience estimate provides a broader sweep that includes the larger audience for any of the material offered by a station.

SPECIAL STUDIES OF CLASSICAL MUSIC LISTENERS

While the ratings provided by the Arbitron and Pulse services tend to be the general standard in commercial radio, stations broadcasting arts and cultural material (mainly classical music) can make use of more specialized audience research to improve their income from the sale of commercial time to advertisers. The main reason is that the demographics detailed by traditional ratings are limited to age and sex, while classical music tends to reach more affluent consumers. Stations wish to demonstrate these demographic characteristics. Thus, if classical music stations can show that they have large audiences among people who use a product or service, the stations can obtain advertising income from sponsors who wish to reach that group. For example, it has been determined that classical music listeners are more likely to have had a vacation in Europe; so air lines and travel firms should prefer to advertise on such stations. In order to document the relatively high socio-economic status of listeners and their use of products and services, commercial classical music stations in a few of the largest markets have contracted with market research firms for special studies, purchased rights to information already gathered by such firms, or conducted their own surveys. Several examples will be discussed.

Classical Radio Listening and Socio-Economic Status. "Markets in Focus" is a series of relatively comprehensive reports on media and product usuage for a given metropolitan area. Conducted independently by MIF Enterprises, Inc., of

New York, these surveys are based on a large number of interview-written questionnaire-second interview procedures with individuals. WFMT, the "fine arts" station in Chicago, subscribed to the 1975 MIF study for the Chicago market. The study was based on 4,210 completed interviews (a reported recovery rate of 72.2 percent) in 18 counties. MIF used a cluster sampling technique: it selected 614 locations and attempted to obtain data from ten homes in each location. Interviewers contacted individuals in selected households; they conducted personal interviews to collect demographic information; they left a written questionnaire to obtain information on product usuage and media exposure; and they returned to collect the questionnaire and conduct a short debriefing.

The fine arts station was gratified to discover that it had "the highest percentage reported of any Chicago area radio station -- AM or FM -- in: 1) Household income of $25,000 or more per year; 2) Education of college graduates and post-college graudates; 3) Occupations of persons in professional/ technical fields; and 4) Ownership of home or apartment."

The "highest percentage reported" analysis does not mean that WFMT necessarily had the highest ratings (average or cume) among these groups. It means that when there was an analysis of the WFMT audience, it had a higher percentage of such people within its audience. (The survey produced an estimate of cume audience.) However, this type of study allows a classical station to say, for example, that its listeners are more than twice as likely to be college graduates as listeners to the average station. Combined with more traditional ratings data, such information can provide a powerful tool to help sell advertising time.

The classical music station in New York City, WQXR, has used a MIF study to demonstrate similar characteristics about its listeners. The WQXR presentation provides additional information about the estimated number (in thousands) of listeners with a given characteristic; and it presents the "percent of total in WQXR's audience" which is a cumulative rating among a selected group of people. Thus, for example, 18 percent of adults in households with more than $25,000 income listen to WQXR. (They accounted for 25 percent of all WQXR listeners.) Other information from MIF that has been distributed by WQXR indicates that 23 percent of the New Yorkers with over $25,000 in investments listen to the station and that the rating among heavy credit card users was 22 percent.

"The Classical Advantage". A company called Axiom Market Research Bureau conducts a major survey in the 48 contiguous states which it calls the "Target Group Index" of TGI. The completed sample was more than 21,000 respondents throughout the country. Data have been presented to indicate the degree to which listeners to "Classical & Semi-Classical" stations are more likely than average to use a large number of products and services. Some examples:

- Classical listeners are 80 percent more likely to have traveled outside the U.S. in the last three years.
- They are 73 percent more likely to have purchased a new imported car and 185 percent more likely to have purchased a new luxury car.
- They are 125 percent more likely to drink vermouth.
- They are 119 percent more likely to drink domestic wine and 148 percent more likely to be frequent users of imported wine.
- They are 75 percent more likely to have been active in civic affairs.

The list is quite extensive; the figures have been called "The Classical Advantage" -- indicating the advantage to an advertiser who purchases time on classical stations. It also gives a great deal of information about the nature of the audience for classical music in the United States.

Local Audience Analyses in New York. WQXR, the classical music station in New York, has undertaken two local audience analyses that are of interest. First, it has established an advisory panel of listeners from whom it gathers data. Starting in 1966, the station made on-air appeals for listeners to become members of this panel. From among the responses, the station selected a group of panelists to which it has sent survey materials. The panel reached 5,000, but in 1974, the station decided to limit the panel to 1,600 members. Panelists were mailed extensive written questionnaires. The survey yielded a 77 percent response rate and presented findings about household income, occupation, age, level of education, geographic distribution of listeners, amount of listening, etc. In general, the results again indicated the higher socio-economic status of people who listen to classical music stations.

A second local research effort for WQXR was undertaken by the research department of Van Brunt & Company, Advertising-Marketing, Inc. This was a telephone survey to four relatively upper-income areas of metropolitan New York: selected towns in Nassau County, a selected area of Westchester County, a high-income zip code grouping in Manhattan, and selected towns in suburban New Jersey. Nine researchers conducted the telephone interviews using numbers derived

from the published telephone directory. (Other details of the research technique are not given in the report.) When asked, "What radio stations do you usually listen to?" respondents in two of the four affluent areas mentioned WQXR more frequently than any other station (21 percent in Nassau and 42 percent in the Manhattan area), Westchester respondents listed it second to an all news station (25 percent for WQXR), and the New Jersey sample listed it fifth (15 percent) among 21 stations mentioned. This is another method of demonstrating to potential advertisers that classical music stations reach the affluent. CPB and NPR also have undertaken research on the audience for public radio. Results were not available when this report was prepared.

WHAT ARTS AND CULTURAL PROGRAM MATERIALS WOULD BE USED BY BROADCASTERS IF THEY WERE AVAILABLE?

There was no clear consensus among the radio broadcasters interviewed as to what types of program materials would be used if available. Their most common response revealed their feeling that factors other than program content were important. Interviewees did not usually respond with comments about more symphony broadcasts, experimental American composers, or the like; they were more likely to respond with comments about production qualities.

One type of material that received numerous mentions was live material. Stations from classical to jazz mentioned that they would like to air live performances. Some commercial stations even indicated that they would be willing to omit the usual commercial interruptions in order to present a high quality live performance.

The quality of arts and cultural material was stressed by more than one station. "There is nothing in particular that we need, but anything we would take would have to be of very high quality," was a typical comment. In these cases, quality referred to the actual sound recording as well as program content.

Broadcasters also felt a need for promotional material. Many of the broadcasters felt that they already had a significant amount of arts and cultural material on the air. However, more money for promotional efforts would help bring the material to the attention of a greater audience. The director of artistic funding for a large corporation said that he felt a certain portion of any grant made should be allocated to promotion. He felt too many groups spend all of their money on production, and have none left to tell people about the production.

The general manager of one large and profitable commercial FM fine arts station maintained that his station already had more material than it could use, with more than ten symphonies in syndication from which to pick. What he wanted was some basic research to determine how and why a person acquires a taste for the fine arts. If that could be learned, he thought that his station could do whatever had to be done to "turn more people on" to arts and culture.

The program director of a public station pleaded that whatever the content of the material, he wanted it to come in standard lengths -- preferably thirty minute units. He complained that many series of programs come in different lengths for different episodes. This, he explained, made it impossible to schedule them in a good spot: either they

would have to start at different times or would have to end at different times. If a program starts at different times, it is hard for a listener to habitually tune to a program that he likes. If a program ends at different times, the following program suffers.

The rise and fall of one piece of programming is shown by the 48-year-history of the "Standard Hour" and the accompanying "Standard School Broadcast." Standard Oil of California began supporting arts and cultural programming in 1926 with a broadcast of the San Francisco Symphony Orchestra. In return for a $10,000 donation to the San Francisco Symphony, Standard received broadcast rights it used to bring live classical performances to the public. Soon, other orchestras in other cities were involved. The symphony broadcasts were carried on commercial stations along the West Coast on a "network" consisting of stations where Standard purchased air time. This generated a great deal of interest at the time because many people in small towns had never heard a live symphony before. The "Standard Hour" became a fixture of Sunday night radio. These broadcasts continued until 1955. Increases in the cost of air time, and a lack of public interest (in some places Standard was unable to give away tickets to the live performances) killed the "Standard Hour."

One result of the "Standard Hour" broadcasts was that many listeners wrote in to ask questions about aspects of classical music. The company decided that an educational program explaining and demonstrating the different terms and musical instruments would be beneficial. Thus, the "Standard School Broadcasts" began in October 1928. A one hour program consisting of an announcer and a string quartet would demonstrate passages and explain terms relating to the next Sunday night broadcast. The "Standard School Broadcasts" traditionally were aired Thursday mornings at 11:00 am. The first broadcasts were received by 72 schools scattered up and down the Pacific Coast and were carried on commercial radio in a network set up by Standard for these broadcasts. The "Standard Hour" was originally carried live, and it was supplemented by a limited number of pressings on records dsitributed to the stations. After broadcast, these were returned on Standard and redistributed to schools that could not receive the programs on radio.

The "Standard School Broadcasts" continued in this fashion until 1955, when the "Standard Hour" left the air. From 1955 to 1966, the "Standard School Broadcasts" continued their musical education-by-demonstration format without the benefit of the Sunday "Standard Hour" concerts. In 1966, a decision to wed the music appreciation material of the "Standard School Broadcasts" to a "harder" discipline, social studies, prompted an examination of the popularity of

the Broadcasts. It was found that few schools still used radio as an instructional medium. They had television sets, tape recorders, and movie projectors, but not radios. Also the traditional time slot (Thursday, 11:00 am) fell at a time when more basic subjects such as reading, writing, and arithmetic were taught. Thus, in 1970, the "Standard School Broadcasts" left commercial radio.

The broadcasts still air on 52 public radio stations. These stations serve school districts that still use educational radio programs. Ed Franklin, of Standard Oil of California, cited Portland as an example of one area with an aggressive educational radio program in the schools.

In order to supplement distribution to schools that did not receive the programs by radio, Standard pressed 20,000 records and distributed these directly to the school libraries. Currently, Standard is producing a film strip with taped accompaniments highlighting the history of American music. The musical-narrative soundtrack to these film strips is also aired on some public radio stations. Standard plans to go back to pressing records for the next year and also plans to continue airing the series on the limited number of public radio stations.

One unexpected benefit of Standard's program is that an educational materials producer has picked up the Standard material (which was distributed only in Standard of California's western territories) for distribution and sale to the whole country. The royalties from the sales of Standard's material will be used to offset expenses for current and future productions.

PRELIMINARY ESTIMATES OF THE AMOUNT OF ARTS AND CULTURAL MATERIAL BROADCAST

We have been unable to discover a useful source of data regarding the actual number of broadcast hours devoted to cultural materials in the United States. It is precisely this lack of firm quantitative data that indicates the need for a survey to obtain such information. One problem, of course, is the lack of a definition scheme that covers the concept "arts and cultural" to everyone's satisfaction. Worse, there does not seem to be a source of data for programming hours or listeners reached by any content category. The best available information appears to be the summary of radio station formats published in Broadcasting Yearbook. Other data sources offer information in greater detail about the content of individual radio stations. Standard Rates and Data Services and Radio Programming Profile both give precise listings of typical content for many radio stations. However, these publications have severe drawbacks for our purposes. Both exclude non-commercial radio, where a great deal of arts and cultural programming takes place; neither exhaustively covers all commercial radio stations (Radio Programming Profile is two thick volumes covering all commercial stations in the top 200 markets in the country, yet that includes only 2,500 of the more than seven thousand commercial stations); neither provides pooled, aggregate or average data by programming type. Even if we wished to use these sources, data analysis would require a computerized coding process well beyond the scope of this planning study.

A rough analysis, however, was possible using raw data published in the Broadcasting Yearbook. That publication lists all U.S. radio stations by main format, adds a list of formats of "special programming" rather than principal formats, and indicates whether stations are AM, FM, or non-commercial. From this published list, we were able to hand-tabulate the data presented in the following table.

Table R-5 Classical & Jazz Stations

CLASSICAL STATIONS	TOTAL	COMMERCIAL AM	COMMERCIAL FM	PUBLIC
Primary Format	191 (2.3%)	15 (0.3%)	52 (1.8%)	124 (14.6%)
Special Programming	201 (2.5%)	50 (1.1%)	65 (2.3%)	86 (10.1%)
Total, Any Classical	392 (4.8%)	65 (1.5%)	117 (4.1%)	210 (24.7%)
JAZZ STATIONS				
Primary Format	84 (1.0%)	11 (0.2%)	26 (0.9%)	47 (5.5%)
Special Programming	150 (1.8%)	19 (0.4%)	23 (0.8%)	108 (12.8%)
Total -- Any Jazz	234 (2.9%)	30 (0.7%)	49 (1.7%)	155 (18.3%)
ESTIMATED TOTAL, ALL STATIONS IN USA				
	8,153 (100%)	4,481 (100%)	2,826 (100%)	846 (100%)

Classical music formats characterize 191 of the 8,153 radio stations in the country. Fifteen of these are AM commercial stations, 52 are FM commercial stations, and 124 are public stations. When stations which broadcast at least some classical music are added, the total becomes 392 stations, or 4.8 percent of all radio stations; 65 are commercial AM stations -- 1.5 percent of all commercial AM; 117 are commercial FM stations -- 4.1 percent of all commercial FM; and 210 are public stations -- 24.7 percent of all public stations. Stations featuring jazz programming are fewer; and public stations also represent the great majority (155 of 234) of them. Less than 1 percent of all commercial AM stations program jazz, less then 2 percent of commercial FM stations feature jazz, but 18 percent of the public stations feature jazz in their formats.

It is probably safe to assume that the stations listed under classical music and jazz formats devote nearly all of their air time to such material, but the average weekly quantity of special programming is fairly low. Between five and ten hours per week is the best estimate for the average amount of classical music or jazz programmed by stations listed under special programming. (The number of hours is given and ranges from one hour to twenty hours per week.) This

produces an estimate of about 7 percent of the air time on the stations with such special programming. Given the limitations of these assumptions, we arrive at the following very rough estimate of percentage of radio air time devoted to classical music and jazz.

Table R-6 Estimated Air Time

	All Stations	Commercial AM	Commercial FM	Public
Classical	2.5%	0.4%	2.0%	15.4%
Jazz	1.2%	0.3%	1.0%	6.4%

As Table R-1 showed, the vast bulk of radio programming in the United States comes from stations that program Middle-of-the-Road, which accounts for 30 percent of all stations; Country and Western, which accounts for 21 percent; and Top 40, which accounts for 18 percent. These three formats cover seven out of ten stations. When public radio stations are removed from the analysis, the three categories account for more than three quarters of station formats.

The analysis in Table R-6 is an estimate of only two types of radio content that might be considered arts and cultural material. Other performance formats that might be included are not available: folk music, live performances, and radio drama, for example. Nor is there any way to get a quantitative estimate of the air time devoted to reviews and commentary on culture and the arts. However, from our experience and interviews, it appears that air time for folk music, live performances, radio drama, or any other performance material that could be considered arts and culture is extremely limited; most cultural reviews and commentary exists on stations that are among those with primarily classical music formats. (Therefore, air time for review and commentary has already been included in the estimates in the tables presented above.) All things considered, it would be surprising if more than 5 percent of all radio air time could be in any way considered arts and cultural programming. Probably no more than 1 1/2 percent of commercial AM time contains such content (and much of this is classical music simulcast by a single holder of licenses for AM and FM radio in the same community); at most 4 percent of commercial FM time might provide some type of cultural content. Public radio seems to be the place to find such material; it provides arts and culture on perhaps as much as a third of all air time on non-commercial stations. (The public radio estimate is based on the relatively high proportions of classical music and jazz, the known distribution of radio drama and a regular arts criticism programs, and the propensity for many public stations to play folk music and other "high culture" material. It should be noted again

that not all non-commercial stations are NPR members; not do they all have highbrow programming. Many non-commercial stations serve college communities with programming for the students; by our count, 12.4 percent of all public radio stations report a Top 40 programming format.) Please remember that these estimates are not the result of a statistically valid survey techinique.